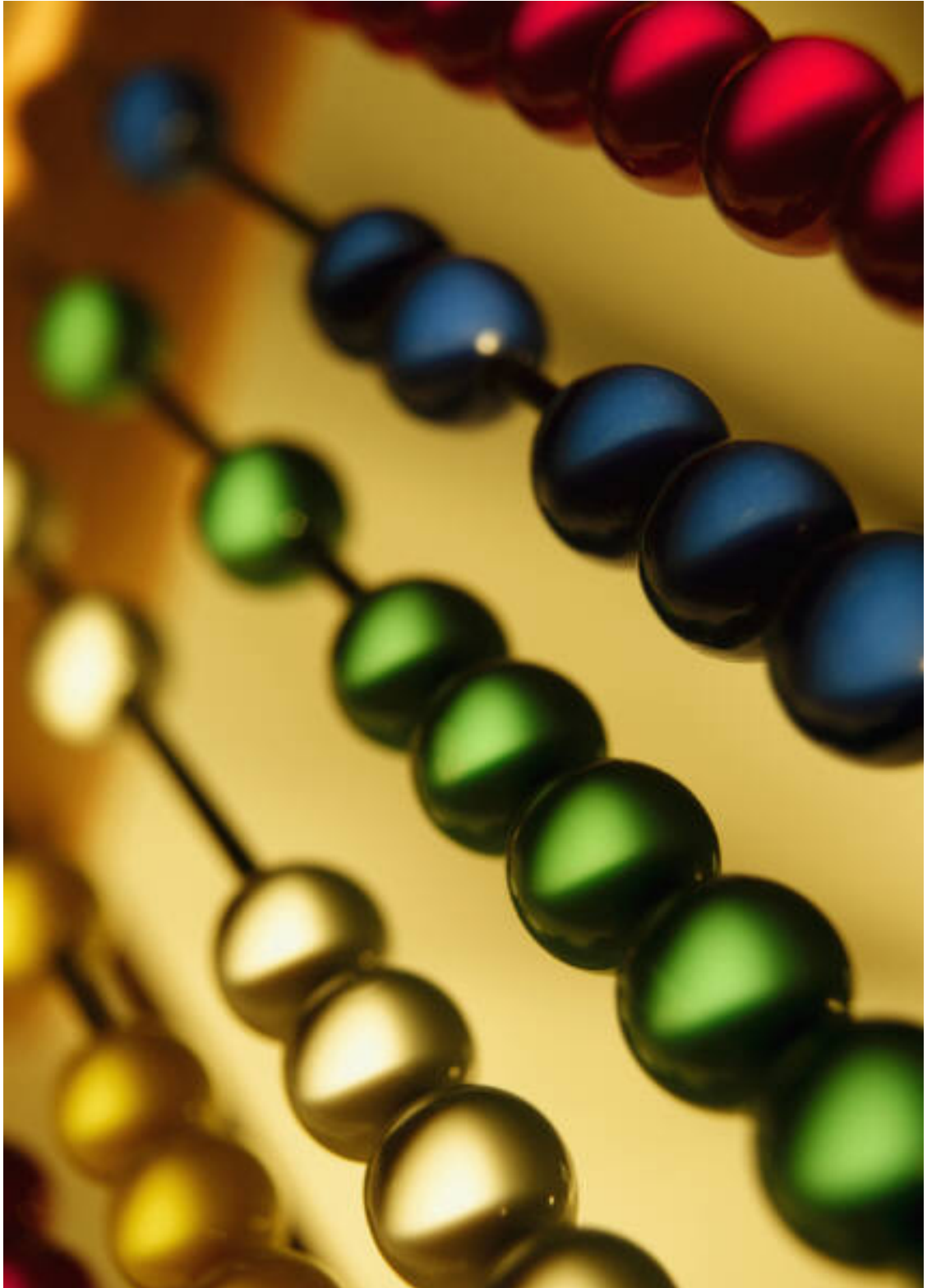# Bi-Weekly Report as of July 23, 2004

FSA Performance Plan – FY2004

SUMMARY

COMPLETED

- On July 18 the FISAP software was posted to the e-CB website. This completes Project 6 *(Administer Campus-Based (e-CB) activities).*

- A new training contract was awarded on July 16. Pearson Government Solutions and two small businesses (Windwalker and Information Experts) are the selected vendors to help develop and deliver program and technical training for schools through a combination of videoconferences, web-based training, and classroom experiences. *(Project 11)*

- FSA conference customer satisfaction ratings were maintained and reviews of FSA conference sessions were increased by thirty percent for this reporting year. This completes Project 41 *(Plan and manage FSA conferences).*

- A pilot was successfully implemented with eZAudit and X-sites at the VDC for access management and management architecture. The pilot architecture tested alternative solutions to determine what commercial products best support the business and security needs of FSA. In addition, discussions were held with the CSB Architecture and Security Team to ensure compatibility of the selected tools with CSB implementation and requirements. Project 73 *(Develop FSA Security and Privacy Architecture Pilot)*

GREEN LIGHT

- Total non-consolidation recoveries reached $1.321 billion, a 24 percent increase from the same period in FY 2003. Project 13 *(Borrower Services – Enhance program monitoring and oversight).*

- On July 14 two updates were provided on FSANet: the return of the Water Cooler and Senior Leadership notes. The Water Cooler contains three different forums: FSA Assists, FSA Car Pool and FSA Blackboard. FSA Assists is an online forum for FSA employees to pose questions to management about issues impacting FSA. Employees can ask questions publicly or privately. The FSA Blackboard is for employees to post announcements such as retirement celebrations, lost items, etc. These updates contribute toward the completion of Project 42 *(Manage, develop and update content for FSANet)*

- GAO's draft report on their high-risk review of FSA is expected in the next two weeks. Project 53 *(Prepare and continually monitor and report on the accomplishments of the High Risk Plan).*

- Now that the calculation of the FY 2004 credit subsidy estimates is completed and contract support for credit reform has been obtained, Project 56 *(Review Credit Reform estimates)* is on track to be completed before the end of the fiscal year. CFO is now conducting an analysis of business processes and estimation tools and identifying opportunities for improvement.

July 23, 2004

YELLOW LIGHT

- Several Projects have been reported as Yellow for at least two consecutive reporting periods:
  Project 8:   Expand eZAudit initiative.
  Project 29:   Sustain and improve timely reconciliations.
  Project 71:   Reengineer EDExpress.
  Project 74:   Implement Leadership Excellence Development training.

RED LIGHT

- Due to a lack of progress in updating and disseminating the Federal Student Aid Handbook, Project 10 *(Produce school publications and materials)* is now identified as needing COO assistance to get the Handbook through the review process.

ACTION PLAN STATUS AT A GLANCE
as of July 23, 2004

FSA No.	Indicator	Status
1	IMPLEMENT STUDENT AID AWARENESS INITIATIVES	G
1.1	Leverage partnership activities to disseminate FSA information	✔
1.2	Publish accurate and timely information that meets the needs of our audience	G
1.3	Disseminate information directly to target audience	G
1.4	Respond accurately and timely to requests	G
1.5	Reach customers through Student Aid on the Web	✔
2	IMPROVE CUSTOMER INTERACTIONS/CUSTOMER SERVICE CALL CENTER	G
2.1	Monitor customer feedback to improve services	G
3	CONDUCT APPLICATION PROCESSING (CPS, FOTW, PIN Site, IADD, PM)	✔
3.1	Implement application	✔
4	PROVIDE EDExpress APPLICATION MODULES	✔
4.1	Release application module	✔
4.2	Release Common Origination and Disbursement module	✔
5	PROCESS PELL & DIRECT LOAN TRANSACTIONS THROUGH COD	✔
5.1	Issue COD software release	✔
5.2	Issue COD SOO	✔
6	ADMINISTER CAMPUS-BASED (eCB) ACTIVITIES	✔
6.1	Prepare list of schools that do not submit FISAP; call schools to ensure compliance prior to tentative award notification	✔
6.2	Notify schools of tentative awards	✔
6.3	Call remaining schools that have not submitted FISAPs or that need to correct FISAPs prior to required closure of database	✔
6.4	Issue final awards to schools	✔
6.5	Issue FISAP software release	✔
7	UPGRADE POSTSECONDARY EDUCATION PARTICIPATION SYSTEM (PEPS)	✔
7.1	Complete Oracle 9i Upgrade	✔
7.2	Upgrade Windows NT server that houses the E-App	✔
8	EXPAND eZAUDIT INITIATIVE	Y
8.1	Commence contract start-up	G
8.2	Complete first full cycle of processing (all school types)	Y
8.3	Improve audit review component of compliance activities by increasing the e-submission rate to 95%	G
9	ENHANCE PROGRAM MONITORING AND OVERSIGHT (APP & DEL SERV)	G
9.1	Meet or exceed audit resolution rate of 95% by the end of the fiscal year	G
9.2	Continue to measure school monitoring to assess overall compliance trends	G
9.3	Conduct School Relations initiatives	G
9.4	Conduct Experimental Sites initiative	G
9.5	Administer the Quality Assurance program	G
9.6	Conduct vulnerability assessment	G
10	PRODUCE SCHOOL PUBLICATIONS AND MATERIALS	R
10.1	Annually update and disseminate the Federal Student Aid Handbook	R
10.2	Update and disseminate Direct Loan Program publications	G
11	DEVELOP & DELIVER PROGRAM AND TECHNICAL TRAINING FOR SCHOOLS	✔
12	TRANSITION TO COMMON SERVICES FOR BORROWERS (CSB)	✔
13	ENHANCE PROGRAM MONITORING AND OVERSIGHT (BORROWER SERVICES)	G
13.1	Default Recovery Rate on FSA-held portfolio 9.5% or more	G
13.2	Update FSA-wide risk management and default prevention inventory.	G
13.3	Complete the work on the implementation of the life-time default rate measure.	G
13.4	Identify and enhance current delinquency/default prevention tools for the DLProgram	G
13.5	Conduct vulnerability assessment	G

FSA No.	Indicator	Status
14	IMPLEMENT HIGH QUALITY CUSTOMER SERVICE TO THE DL PORTFOLIO	G
15	IMPLEMENT PLAN TO IMPROVE CONTRACTOR OVERSIGHT TO DL CONSOLIDATION OVERPAYMENTS/UNDERPAYMENTS	G
16	PERFORM NSLDS MAINTENANCE/OPERATIONS ACTIVITIES	G
16.1	Perform cohort default rate calculations, send, and post	G
16.2	Prepare/send GA fee calculations. Review Forms 2000 reasonability data	G
16.3	Review, evaluate, prepare GA NSLDS data integrity improvements reports	G
16.4	Make enhancements to Loan Processing and Issuance Fee (LPIF) process for rate changes	✔
16.5	Participate in the formulation of school cohort default rate initiatives	✔
16.6	Provide monitoring functionality of GA and Lender reasonability on a monthly basis	G
16.7	Upgrade Data Prep Software to be compliant with Windows 2000 and XP	✔
16.8	Implement Education Credit Management Corporation (ECMC) file format changes	✔
17	RE-COMPETE CONTRACT FOR NSLDS MAINTENANCE/OPERATIONS	✔
17.1	Award new contract	✔
17.2	Monitor and manage transition to new contractor	✔
18	RE-COMPETE CONTRACT FOR FP DATA MART MAINTENANCE/OPERATIONS	✔
18.1	Award new contract	✔
18.2	Monitor and manage transition to new contractor	✔
19	PERFORM MAINTENANCE/OPERATIONS ACTIVITIES FOR THE FP DATA MART	G
19.1	Quarterly status report on ways to improve effectiveness/efficiency of Data Mart review process	G
19.2	Quarterly evaluation of use and value added to the guaranty agency and lender review processes	G
19.3	Monitor Data Mart feeds to provide accurate, concise and timely data to users	G
20	PERFORM FINANCIAL PARTNERS PORTAL OPERATIONS ACTIVITIES	G
20.1	Monitor and evaluate web page hits to drive future postings to portal	G
20.2	Maintain current and relevant information to financial partners' user community	G
20.3	Obtain/evaluate feedback from financial partners' user community on value of information posted on the Financial Partners Portal	G
21	PERFORM LEAP/SLEAP ACTIVITIES	✔
21.1	Review, evaluate, reconcile, and prepare performance reports	✔
21.2	Prepare and submit clearance paperwork	✔
21.3	Review/approve applications from states. Obligate, generate, and mail grant award notifications	NR
22	PERFORM VOLUNTARY FLEXIBLE AGREEMENT (VFA) ACTIVITIES	G
22.1	Perform cost neutrality analysis and provide results	✔
22.2	Prepare performance measure assessment and benchmarking reports	G
22.3	Evaluate new applications for VFA	G
22.4	Foster effective working relations with guaranty agencies during scheduled site visits	G
23	PERFORM MAINTENANCE/IMPROVEMENTS TO THE FP ELECTRONIC RECORDS MANAGEMENT (ERM) SYSTEM	✔
23.1	As appropriate, integrate ERM work with other FSA business units	✔
23.2	Analyze and evaluate the current use of the ERM system to identify improvements	✔
24	PROMOTE EFFECTIVE/EFFICIENT COMMUNICATIONS INTERNALLY & EXTERNALLY	cancelled
24.1	Coordinate and enhance communications within Financial Partners and externally	cancelled
24.2	Hold quarterly checkpoints for all areas of FP service concerning communications	cancelled
25	ENHANCE PROGRAM MONITORING & OVERSIGHT (FP)	G
25.1	Participate and provide Financial Partners Channel support for ED audit	G
25.2	Prepare and conduct program reviews of guaranty agency and lenders/servicers	G

FSA No.	Indicator	Status
25.3	Analyze and collect third-party audit findings	G
25.4	Utilize GA/lender scorecards to reduce risk and improve review process	G
25.5	Partner with guaranty agency community on the Common Review Initiative (CRI)	✔
25.6	Conduct vulnerability assessment	G
26	SUSTAIN CLEAN AUDIT OPINION, ADDRESS MATERIAL WEAKNESSES AND REPORTABLE CONDITIONS IDENTIFIED IN ANNUAL FINANCIAL STATEMENT AUDITS	G
27	PERFORM INTERNAL CONTROL REVIEWS TO ENHANCE FINANCIAL MGMT	R
28	FINALIZE FY 2002 & FY 2003 COST ACCOUNTING MODEL AND DEVELOP BASELINE FY 2002 UNIT COSTS	G
29	SUSTAIN/IMPROVE TIMELY RECONCILIATIONS & IMPLEMENT OTHER PROCEDURES TO COMPLY WITH FY 2004 ACCELERATED REPORTING REQUIREMENTS	Y
30	MANAGE FMS OPERATIONS	G
31	DEVELOP & DEPLOY ENTERPRISE PERFORMANCE TEST ARCHITECTURE	G
32	PROVIDE ENTERPRISE & DATA ARCHITECTURE MANAGEMENT	G
33	PROVIDE SECURITY & PRIVACY SUPPORT TO FSA BUSINESS UNITS	G
34	PROVIDE INTEGRATED TECHNICAL ARCHITECTURE (ITA) & ENTERPRISE APPLICATION INTEGRATION (EAI) MAINTENANCE AND PRODUCTION SUPPORT	G
35	SUPPORT THE FSA IT ASSETS AT THE VDC WITH LINES OF SERVICE	G
36	CONTINUE ENTERPRISE QUALITY ASSURANCE PROGRAM TO SUPPORT THE FSA CIO IN CONDUCTING SYSTEMS ASSESSMENTS/EVALUATIONS	G
37	SUPPORT ED, CUSTOMERS AND BUSINESS PARTNERS BY PARTICIPATING IN THE PRESIDENT'S MANAGEMENT AGENDA E-GOVERNMENT INITIATIVES	G
37.1	Release GovLoans Gateway	✔
38	PROVIDE HIGH QUALITY INFORMATION, RESEARCH AND INFORMAL PROBLEM RESOLUTION SERVICES TO STUDENT LOAN BORROWERS AND OTHER PARTICIPANTS IN STUDENT AID PROGRAMS	G
39	CONDUCT REAUTHORIZATION ACTIVITIES	NR
40	POLICY LIAISON PLACEHOLDER	NR
41	PLAN AND MANAGE FSA CONFERENCES	✔
42	MANAGE, DEVELOP AND UPDATE CONTENT FOR FSANet	G
43	MANAGE CONTROLLED CORRESPONDENCE FUNCTIONS	G
44	DEVELOP & IMPLEMENT INTERNAL/EXTERNAL COMMUNICATIONS STRATEGY	G
45	MATURE ENTERPRISE-WIDE PROCUREMENT PLAN	✔
45.1	Complete market research to resolve plan issues	✔
45.2	Synch Plan w/BIG End State Vision	✔
46	DEVELOP ACQUISITION WORKFORCE	G
47	IMPLEMENT ENTERPRISE CONTRACT PERFORMANCE MONITORING MEASURES AGAINST NEW SYSTEMS CONTRACT AWARDS	G
47.1	Incorporate CSB into enterprise process	✔
47.2	Incorporate Front-End Business Integration Systems (FEBI) into enterprise process	G
48	CONTINUOUSLY UPDATE AND MONITOR PROCUREMENT INTERNAL CONTROLS	G
48.1	Establish monitoring and reporting process for government furnished property	✔
48.2	Establish reporting process to monitor vendor performance	G
49	INCREASE CONTRACT DOLLARS AWARDED TO SMALL BUSINESSES	G
49.1	Increase dollars awarded directly to small businesses	cancelled
49.2	Increase dollars awarded through large business primes to small business subs	cancelled
50	CONTINUE TO IMPLEMENT INTEGRATED PROJECT MANAGEMENT OVERSIGHT FOR FSA'S SYSTEM INTEGRATION ACTIVITIES	G
51	EVALUATE & IMPLEMENT SELECTED PROJECT MANAGEMENT STANDARDS BASED ON THE SOLUTION LIFE CYCLE	R

FSA No.	Indicator	Status
52	RESTRUCTURE INTEGRATION LEADERSHIP SUPPORT TO TRANSITION TO FSA STAFF	G
53	PREPARE & CONTINUALLY MONITOR/REPORT ON THE ACCOMPLISHMENTS OF THE HIGH RISK PLAN	G
54	DELIVER WORKFORCE DEVELOPMENT AND SUPPORT PROGRAMS	NR
54.1	Continue Intern Program	G
54.2	Conduct FSA Orientation	G
54.3	Implement results of One-ED Competitions	Y
54.4	Update Skills Catalog/Learning Tracks	G
54.5	Implement Workforce Alignment Strategy	Y
54.6	Update FSA Human Capital Plan	NR
55	PERFORM FACILITIES MANAGEMENT ACTIVITIES	✔
55.1	Implement facilities needs	✔
55.2	Coordinate security needs	✔
55.3	Administer records management	✔
55.4	Coordinate the distribution of the Transit-Benefit program	✔
56	REVIEW CREDIT REFORM ESTIMATES	G
57	DEVELOP TRIAL BALANCE CAPABILITY FOR COD AND CSB	✔
58	SUPPORT THE IMPLEMENTATION OF ORACLE FEDERAL FINANCIALS RELEASE 11i	G
59	IMPLEMENT AUTOMATED BUDGET FUNDING ENTRY SOLUTION	G
60	IMPLEMENT FORMS 2000 ADDITIONAL ENHANCEMENTS	✔
61	IMPLEMENT ENTERPRISE DATA STRATEGY INITIATIVES	G
61.1	Map current state and future state business flows of data	✔
61.2	Develop requirements and initial design for common identifiers for schools and students	✔
61.3	Develop an integrated data warehouse and Data Mart strategy	✔
61.4	Develop technical standards, conventions and data management guidelines	✔
61.5	Determine current data quality and establish a target state plan and quality assurance process	✔
61.6	Develop an enterprise-wide extensible markup language (XML) technical architecture framework to enhance data sharing and standardization with our external customers	✔
61.7	Continue to build on Phase I by developing a detailed vision on FFEL/enrollment data flow, gaps/impact of Common Services for Borrowers (CSB), electronic Case Management Oversight (eCMO), NSLDS and electronic Campus-based systems	G
61.8	Conduct market research to validate the feasibility of the target conceptual design	✔
61.9	Develop the detail Data Quality Execution Plan	G
61.10	Develop a holistic XML Management Plan	G
61.11	Implement SSIM as a pilot on renewal applicants	NR
62	BEGIN THE IMPLEMENTATION OF COMMON SERVICES FOR BORROWERS (CSB)	Y
62.1	Award Contract	✔
62.2	Begin implementing Phase I of the FSA-approved transition plan	Y
63	IMPROVE SCHOOL PARTNER OVERSIGHT	G
63.1	Implement Integrated Partner Management (IPM) system	G
63.2	Develop Consolidated requirements for IPM system	✔
63.3	Develop enrollment high-level design	✔
63.4	Develop access high-level	✔
63.5	Develop Routing ID (RID) high-level design	✔
63.6	Select competitively a vendor to perform the conceptual design and development of the IPM system	G
63.7	Begin requirements gathering for eCMO	✔
63.8	Procure the design of a workflow tool for SEC	cancelled
64	IMPROVE THE ACCURACY OF APPLICANT DATA	✔

FSA No.	Indicator	Status
64.1	Improve the effectiveness of verification	✔
64.2	Restructure CPS to become a multi-year database	✔
64.3	Implement ISIR Data Mart	✔
65	CREATE A TARGET STATE VISION OF A FRONT END BUSINESS INTEGRATION (FEBI)	✔
65.1	Conduct market research	✔
65.2	Issue CPS Statement of Objective (SOO)	✔
66	RE-ENGINEER NSLDS (PENDING DATA STRATEGY OUTCOME)	cancelled
67	PREPARE TO IMPLEMENT IRS DATA MATCH	G
68	CONTINUE LEARNING COUPON PROGRAM	Y
69	PROVIDE CAREER ZONE SERVICES	NR
70	INCREASE STUDENT FINANCIAL AID PROGRAM AWARENESS	G
70.1	Expand federal student aid awareness and outreach program	G
70.2	Develop and implement long-term mass marketing strategy	G
71	RE-ENGINEER EDExpress	Y
71.1	Conduct A & F Study with product registration	✔
71.2	Link application processing to FAA Access	✔
71.3	Implement Return to Title IV Web Release	Y
72	DEVELOP A LATE DISBURSEMENT APPROVAL AND TRACKING SYSTEM	cancelled
73	DEVELOP FSA SECURITY AND PRIVACY ARCHITECTURE PILOT	✔
74	IMPLEMENT LEADERSHIP EXCELLENCE DEVELOPMENT TRAINING	Y

Key:

G	On Track
Y	Progress Concerns
?	Progress Concerns by EPMS
NR	Not Reported
R	Management Intervention Required
✔	Completed
Cancelled	The project will not be completed in FY 2004 due to a shift in FSA leadership priorities, and therefore, unappropriated resources.
	Operations
	Discretionary

FSA Project Status Report

FSA No	Area	Action Item			
		Status_Date	Comments	%Complete	Status
1	**ADS**	*Implement student aid awareness initiatives.*			
		7/23/2004	Progress continues in each of the Milestones. Two of the milestones associated with this project (1.1 and 1.5) have exceeded their success measures. The remaining three (1.2, 1.3 and 1.4) are on schedule for completion on or before 9/30/04.	55%	Green
		7/9/2004	Progress continues in each of the Milestones. Two of the milestones associated with this project (1.1 and 1.5) have been successfully completed. The remaining three (1.2, 1.3 and 1.4) are on schedule for completion prior to 9/30/04.	50%	Green
2	**ADS**	*Improve customer interaction through customer feedback particularly at the Customer Service Call Center (CSCC).*			
		7/23/2004	Progress continues in all identified areas. Of particular note, an improvement was made to the Lotus Notes software as a result of ongoing meeting with the EZ Audit staff.	81%	Green
		7/9/2004	Progress continues in all identified areas. Of particular note, at the end of June 2004, the IFAP Subscription Service membership reached 5,230 members, which is 111 additional subscribers since the previous month. This is a 26% increase since the beginning of FY 2004.	77%	Green
6	**ADS**	*Administer Campus-Based (eCB) activities.*			
		7/23/2004	With the posting of the FISAP software to the e-CB web site on 7/18/2004 (milestone 6.5), this project has now been completed.	100	Completed
		7/9/2004	FISAP testing has been completed, and corrections are now being incorporated into the eCB System. FISAP software will be issued to schools the week of 7/12/2004.	93%	Green
8	**ADS**	*Expand eZAudit initiative.*			
		7/23/2004	Market research interviews begin 7-22 through 7-28. SOW went to Accenture. Proposal due back this week. Award of Task Order within 2 weeks. As of 7-18-04, 4,267 annual audit submissions have been rec'd. 1,743 submissions have passed the QC screening. We will monitor this workload to assure timely processing. As of 7-18-04, 3,186 schools have registered, about 73% of all schools.	85%	Yellow

		7/9/2004	Market research began (companies were selected). Finalized SOW. Requested funding for the development of required reporting (17) for operational and OMB support. As of 7-04-04, 4,090 annual audit submissions have been rec'd. The large increase from the previous reporting period is due to the June 30 reporting deadline for those proprietary schools that have a FY end of 12-31 and over 700 submissions from the FY 02 reporting period.. 1,454 submissions have passed the QC screening. We will monitor this workload to assure timely processing. As of 7-05-04, 3,150 schools have registered, about 72% of all schools.	80%	Yellow
9	ADS	*Enhance program monitoring and oversight.*			
		7/23/2004	9.1 For the biweekly period 7-5-04 to 7-18-04, 96% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. We are continuing to monitor this closely. There are 20 audits on administrative stay. The audits on administrative stay are not included in the calculation of the performance measure. These audits have complex issues, and we do not know when they will be resolved. The effect of 20 audits on the performance of FSA's annual workload of 4000 - 5000 audits is about one half of 1 percent. 9.2 On 7-14, Fin Partners decided to initiate certain changes at the NSLDS that will provide simplified options for transfer student monitoring for institutions with additional locations. Therefore, we are delaying further contact with institutions that do not yet have transfer student monitoring profiles for one or more of their additional locations. We are continuing to contact institutions where the main campus only has not yet established their profile. More info on school options for locations to be forthcoming in another week. For the first 3 qrts of FY 04, SEC conducted a comprehensive review of 1,990 unduplicated schools, or 32% of the total population, covering 37% of Title IV funding. An add'l 152 schools received an on-site program review and 84 schools received an on-site technical assistance visit. 9.3 Work continues on the HBCU Perikins project and the tracking database development is planned on being finished in the upcoming week. 9.4 ASEDS is working with CIO to fund the updates to the reporting mechanism for the next cycle of data submission and analysis. 9.5 ISIR Analysis Tool training expected to be finished in mid-Auguest 9.6 Work this reporting period focused on internal controls and vulnerabilities in monitoring schools that deliver Title IV aid. During the next reporting period, work will include more focus on identifying vulnerabilities around student identification and authentication.	75%	Green

		7/9/2004	9.1 -For the biweekly period 6-22-04 to 7-04-04, 95% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. We are continuing to monitor this closely. There are 20 audits on administrative stay.	73%	Green

9.2 - Case Team actions have reduced the number of schools and additional locations without the required NSLDS transfer student monitoring profiles by over 32%. 735 new profiles have been established reducing the number without required profiles down from 2,356 on 3/17/2004 to only 1,509 on 6/25/2004. Training is on track.

The Administrative Actions & Appeals Division has received 62 referrals for administrative action and initiated 13 debarments from 10-01-03 through 7-06-04.

9.3 - HBCU Perkins Default project's analysis completed

9.4 - ASEDS received the first draft of the preliminary report on the results from the experiments during academic year 2002-03

9.5 - Phase I of the ISIR Analysis Tool became available to schools just prior to the expected June 30 release date

9.6 - The team leader continues to meet with subject matter experts in school eligibility, oversight, and systems processing. Work this reporting period focused on identifying existing and planned ASEDS internal controls for preventing improper payments to Title IV schools. Additional research and interviews with subject matter experts are planned for the next reporting period.

10	**ADS**	*Produce school publications and materials.*			
		7/23/2004	10.1 There hasn't been movement in this milestone for two weeks. The owner believes that Terri may need to get involved to speed the POC approval process.	76%	Red

10.2: The PLUS Basics brochure is designed and was reviewed by management and the Direct Loan Coalition last week. Final edits will be completed this week and the document will be submitted to OPA. Once approved, it will be submitted for printing. The students brochure will be finalized shortly after the PLUS is complete. There are 58 back-ordered requests for publications or documents at the warehouse. All of these are for the Direct Loan PLUS Basics brochure that is currently being revised.

		7/9/2004	10.1 - Project remains on track.	74%	Green

10.2 -The Basics brochures continue to progress through the development phase. The Direct Loan PLUS Basics brochure will be presented to the Direct Loan Coalition on 7/12/2004 and then go to OPA for review. There are 52 back-ordered requests for publications or documents at the warehouse. All of these are for the Direct Loan PLUS Basics brochure that is currently being revised.

11	**ADS**	*Develop and deliver program and technical training for schools through a combination of videoconferences, web-based training, and classroom experiences.*			

		7/23/2004	This project has been completed.	100	Completed
		7/19/2004	--Award new training contract by April 2004. The new training contract was awarded on Friday, July 16. Vendors selected are Pearson Government Solutions and two small businesses: Windwalker and Information Experts.	100	Completed
		7/9/2004	--Award new training contract by April 2004. The Panel completed all its work and made its recommendations to the Contracting Officer on June 2. We are awaiting contract award.	80%	Yellow
13	**BS**	*Enhance program monitoring and oversight.*			
		7/23/2004	Total non-consolidation recoveries reached $1.321 Billion, an increase of 24 percent from the same period, thru July 16, 2004, in FY03. This represents 8.30 per cent of the FY04 portfolio balance. The Default Prevention Workgroup will meet July 30 to reach a final agreement on strategies and the tracking of initiatives. The team has divided the initiatives into two categories: "established production" and "tried and not implemented into production". The Risk Management Group will continue to extract information from the NSLDS for FFEL program for cohort years 1994-1998. Direct Loan calculations, based on the year of origination, are complete for consolidated and non-consolidated loans for 1994-1998. The independent Verification and Validation (IV& V) team is continuing to review the functional requirements, detailed designs, and test plan.	88%	Green
14	**BS**	*Implement plan to provide high quality customer service to the Direct Loan portfolio.*			
		7/23/2004	The figures for e-servicing will be available at the end of July –mid August. The results will be provided on the next report. The CSB web team is continuing development of the new Borrower Services website. The development schedule for the site is on track and the completion date for Phase one, as scheduled, will be October 8, 2004.	80%	Green
15	**BS**	*Implement plan to improve contractor oversight and performance related to Direct Loan Consolidation overpayments and underpayments.*			
		7/23/2004	The statistics for Loan Consolidation overpayments and underpayments are released monthly. The next report on this item will be issued mid-August.	80%	Green
16	**FPS**	*Perform National Student Loan Data System (NSLDS) maintenance and operations activities.*			
		7/23/2004	NSLDS Maintenance and Operations Activities operating efficiently. June benchmarks were reviewed and distributed. Work continues on GA and Lender Reasonability.	86%	Green
		7/9/2004	NSLDS Maintenance and Operations Activities operating efficiently. June benchmarks were reviewed and distributed. Work has begun on GA and Lender Reasonability. The initial coordination meeting for the July cohort default rate calculation was held.	85%	Green

FSA No	Area	Action Item			
		Status_Date **Comments**		**%Complete**	**Status**
19	**FPS**	*Perform maintenance and operations activities for the Financial Partners Data Mart.*			
		7/23/2004	The FPDM Operations team is working with FMS Operation team to address two outstanding issues: 1) extracting 10/03 -12/03 LaRs data from the FMS, and 2) have FMS only send new LaR's data to the FP Data Mart. Resolutions for both issues are currently in testing.	88%	Green
		7/9/2004	The PEPS deficiency code is being researched. The contractor migrated several SIR to production.	87%	Green
20	**FPS**	*Perform Financial Partners Portal operations activities.*			
		7/23/2004	The What's New template for the FP Portal has beed redesigned.	95%	Green
		7/9/2004	A revised LEAP/SLEAP page has been added to the Portal. New links will be added to the home page.	94%	Green
21	**FPS**	*Perform Leveraging Educational Assistance Partnership/ Special Leveraging Educational Assistance Partnership (LEAP/SLEAP) activities.*			
		7/9/2004	All applications received were processed. Grant award notifications were scanned to PDF and forwarded electronically. There were five states and three territories that did not apply for 2004-2005 funding. New Mexico, one of the states, has been granted exception to the deadline due to turnover at the state and intends to apply.	100	Completed
22	**FPS**	*Perform Voluntary Flexible Agreement (VFA) activities.*			
		7/23/2004	FPS is responding to questions/comments associated with the draft Performance Measure Report and the VFA Evaluation Process document. FPS began conversations with CSAC/EdFund regarding the cost neutrality of the existing agreement and will be working with them over the next few weeks to identify solutions that achieve cost neutrality and reflect the current direction being taken with new VFA's. Until this reporting period, FPS was on schedule to complete all VFA/GA program reviews by 9.30.2004. ASA is in the process of moving and they have requested an extension on the program review originally scheduled for September 2004. We have provided them with a two-month maximum extension.	95%	Green
		7/9/2004	The draft process document has been forwarded for comments. It is also being used to gauge the processing time associated with the NSLP/EAC VFA request. A draft of the benchmarking report will be forwarded for comments on Friday, 7.9.2004.	94%	Green
23	**FPS**	*Perform maintenance and improvements to the Financial Partners' Electronic Records Management (ERM) system in order to enhance use.*			
		7/9/2004	Completed.	100	Completed
25	**FPS**	*Enhance program monitoring and oversight.*			

FSA No	Area	Action Item			
		Status_Date	Comments	%Complete	Status
		7/23/2004	- Awaiting receipt of three additional months of GA subrogation and receivable data as requested by Ernst & Young (E&Y). - Review of the Nebraska guaranty agency was completed, as well as reviews at three servicers. - Completed collection and analysis of third party audit findings. Completed a summary report of findings for FY03. - The GA and Lender scorecard have been integrated into the FY05 review process. - Work on the NSLDS vulnerability assessment task order continues.	79%	Green
		7/9/2004	- Ernst & Young (E&Y) is requesting three additional months of subrogated and receivable download data from the GAs and FSA. This data request covers time period of April through June 2004. FP will coordinate the E&Y request with all effected parties. - A two-week review of the Rhode Island guaranty agency was concluded, in addition to a CRI review of Wells Fargo. A review of the Nebraska guaranty agency is underway. - The use of the GA scorecard is being integrated into the FY05 planning and review of Guaranty Agencies. - Work on the NSLDS vulnerability assessment task order began on Monday, 6.28.2004.	74%	Green
26	CFO	*Sustain clean audit opinion and address material weaknesses and reportable conditions identified in annual financial statement audits.*			
		7/23/2004	July is a very heavy Provided by Client (PBC) month, as many large items are due during this timeframe. They include downloads, reconciliations, sample material, and scheduling conferences with the auditors to respond to questions.	65%	Green
		7/9/2004	The financial statement audit is going into a new phase. Many Provided-By-Client (PBC) items will be needed during the month of July to support the June financial statements. This is a very heavy PBC month. CFO will be providing downloads, reconciliations, sample material, and scheduling conferences with the auditors to respond to questions. E&Y has also requested additional downloads from Guaranty Agencys for the June financial statement quarter.	50%	Green
27	CFO	*Perform internal control reviews to enhance financial management.*			
		7/23/2004	CFO presented scope change, on Project 27, to the IPC on Wednesday, July 21st. IPC recommended that CFO return to the IPC on Wednesday, July 28th with a detailed project plan. CFO will submit the project plan at the next IPC.	20%	Red
		7/19/2004	Per our meeting this morning CFO is requesting a scope change on project 27. CFO is unable to get the contract awarded and successfully commence internal control reviews before the end of the fiscal year. Jay Hurt will represent CFO at the IPC on Wednesday, July 21st. The project should be changed to read: "Award contract to perform independent system internal control reviews to enhance financial management".	19%	Red
		7/9/2004	No change is status. We are currently rating proposals.	20%	Red
28	CFO	*Finalize FY 2002 and FY 2003 cost accounting model and develop baseline FY 2002 unit costs.*			
		7/23/2004	CFO completed presentations to senior management and GAO during the week of 7/12-7/16. CFO has been meeting extensively with FSA program staff in all FSA divisions to verify organization structure, activities, and allocation methodologies. We are still on-schedule to complete the final FY2003 model by July 31st.	55%	Green
		7/9/2004	CFO continues to prepare the model for presentation to senior management and GAO during the week of July 12-16. We are on schedule to complete the final FY2003 model by July 31st.	40%	Green

FSA No	Area	Action Item				
		Status_Date	Comments		%Complete	Status
29	**CFO**	*Sustain and improve timely reconciliations and implement other procedures needed to comply with FY 2004 accelerated reporting requirements.*				
		7/28/2004	Project status is yellow and 42% due to the fact CFO has not been successful in procuring a contract for the Reconciliaiton Reengineering Project. CFO is working with Contracts to move this vehicle to the Oracle 11i project. Once the contract is successfully moved the project will go to green and % complete will move much higher.		42%	Yellow
		7/23/2004	Monthly Reconciliations: Reconciliations are being performed and completed on time - a record of 8 days for the June 2004 reconciliations compared to the 30-day metric.		42%	Yellow
			Reconciliation Reengineering Project: CFO will be moving the contracting vehicle to Oracle 11i pending approval from Contracts.			
			Desk Operating Procedures: All (total of 8) desk operating reconciliation procedrues have been finalized.			
			Other: Production Environment - The production server has been ordered and should arrive at the VDC within the next month. FSA CFO and CIO are collaborating together on the technical and functional aspects/requirements. CFO is continuing to determine the functional data requirements and methodology for future reconciliations, as well as a plan for rolling out the reconciliations and FSA/CIO is assisting with the technical aspects of the project.			
		7/9/2004	Monthly Reconciliations: Reconciliations are being performed and completed on time (less than 20-days compared to 30-day metric).		40%	Yellow
			Reconciliation Reengineering Project: Continual work with Contracts is in process to determine if existing Departmental BPA is an appropriate contracting vehicle and to re-solicit.			
			Desk Operating Procedures: All (total of eight) desk operating reconciliation procedures have been finalized.			
			Other: Began the next steps to implement the Production environment. We are currently using the Remote Control Explorer software (RCO) to send the files to the CheckFree staging server. We will begin using CITRIX software to do this in the near future. CITRIX is scheduled to be loaded at the VDC during the week of July 12th. This will allow us to access CheckFree at the VDC, without loading the CheckFree software on users desktops. Additionally, the production server has been ordered and should arrive at the VDC within the next month. There is a lot to be done prior to going to production both on the technical side and on the functional side as well. FSA/CIO is assisting with the technical aspects of the project. Determining the functional data requirements and methodology for future reconciliations, as well as a plan for rolling out the reconciliations.			
30	**CFO**	*Manage FMS operations.*				
		7/29/2004	FMS Operations continues to run smoothly. The Operations contractor successfully met all of the operational metrics, earning a 5% incentive bonus. Also, all 9 CCB-approved change requests were implemented in the 6/20 FMS release, requiring no re-work. Finally, the June accounting period was closed within 2 business days.		78%	Green
		7/23/2004	FMS Operations continues to operate smoothly.		78%	Green

		Status_Date	Comments	%Complete	Status
		7/9/2004	FMS Operations continues to operate smoothly.	74%	Green
31	**CIO**		*Develop and deploy Enterprise Performance Test Architecture.*		
		7/23/2004	FAFSA GC Issue Testing continues. A link has been discovered between GC and the number of servlets loaded. Planning is continuing for Ombudsman, FP Portal, Schools portal, SAIG and EMPN planning is proceeding. Scripting is in the final stages of the Schools and FP portal test. Planning for the process and technology libraries is proceeding. The percentage complete for this project has increased significantly for this reporting period from 21% to 80%. The reason for this increase is that the project was being reported on an annual basis based on contract award which occurred in May vs. a Fiscal Year basis ending in September.	80%	Green
		7/16/2004	FAFSA GC Issue Testing continues. Base line tests have been completed. EMPN testing is proceeding. Ombudsman, FP Portal and EMPN planning is proceeding. Planning for the process and technology libraries is proceeding. Initial discussions with Students portal and SAIG have begun.	21%	Green
		7/9/2004	FAFSA GC Issue research is continuing. Several base line runs have been performed. Some root causes are beginning to be ruled out. EMPN testing is proceeding. Ombudsman, FP Portal and EMPN planning is proceeding. Planning for the process and technology libraries is proceeding.	21%	Green
32	**CIO**		*Provide Enterprise and Data Architecture management.*		
		7/23/2004	The ASG met to discuss the governance process and the need for a "fast track" process to get tools/products approved in a quick, but structured process. The Team continues to meet with EPMS team who is completing the BRM alignment task with the Business Owners. The Team is finalized the last of the *lite* Business Cases EA Reviews and drafted another chapter for the EA Case Study publication.	50%	Green
		7/16/2004	The EA Team modified the macros used to generate Popkin Reports in Word with Table of Contents and logos. Created *draft* presentation for Denise's speaking engagement at the Institute for Defense and Government Advancement conference on FSA's use of FEAPMO Reference Models. EA Team completed additional business case reviews, drafted another chapter for the EA Case Study publication, created data schema, interface description, server diagram, business process and component innerconnection templates to be used by vendors to submit EA artifacts to FSA on a regular basis. The ASG met to begin discussions on potential standards needed in support of the changing target architecture and procurements. The group will meet weekly until a revised Standards Guide can be published.	48%	Green
		7/9/2004	The EA team facilitated the Architecture Support Group discussing the mission, charter and responsibilities of the group. The group modified this information with the intent to create one CIO voice and perform "horizon scanning" tactics that will set standards and technological advancements on a proactive basis. The EA Team completed a draft FY06 A-11 Additional Instructions and Guidance Summary. Reviewed revised OMB Guidance with the ITIM/CPIC representatives and established a schedule for this year's Exhibit 300 process.	46%	Green
33	**CIO**		*Provide security and privacy support to FSA business units.*		
		7/23/2004	Completed review of proposals and working with contracts for award of BPA. Completed meetings with COD, VDC, and DLSS for rules of engagement for follow-on C&A activities.	75%	Green

FSA No	Area	Action Item			
		Status_Date	**Comments**	**%Complete**	**Status**
		7/16/2004	Continuing to work with systems to update their plans of actions and milestones. Revalidation of C&A activities have started with rules of engagement meetings for the VDC, DLSS, and COD. Created a timeline for C&A activities for FSA systems. Continuing with reviews of received proposals for security and privacy support work.	75%	Green
		7/9/2004	Working with Systems to update Plans of Actions and Milestones. Reviewing proposals for contract support.	75%	Green
34	**CIO**	*Provide Integrated Technical Architecture (ITA) and Enterprise Application Integration (EAI) maintenance and production support.*			
		7/23/2004	ITA: The team responded to two ITA production support requests and 29 maintenance service requests. FAFSA is being tested in WebSphere 5.1. We met again with PEPS, providing planning support for their move to ITA. We are also supporting the performance testing of FAFSA. EAI: No major production problems were reported during the week; the team responded to 14 COD customer service inquiries. The team continues to support CSB's MQ rollout and is working closely with the ITA team on preparations for eMPN's migration. EAI will be meeting with IBM to discuss a rollout strategy for WBI.	81%	Green
		7/16/2004	ITA: No major production problems were reported during the week; the team responded to 6 maintenance service requests. Fix pack 1 for WAS 5.1 has been installed in FAFSA and ITA development. Student Aid on the Web, Schools Portal, and Financial Partners Portal are all being tested in their WAS 5.0 environments. Preparations are underway to migrate PEPS and eMPN to the ITA environment. We are supporting the performance testing of FAFSA. EAI: No major production problems were reported during the week; the team responded to 21 COD customer service inquiries. The team provided support for CSB's MQ installation and is working closely with the ITA team on preparations for eMPN's migration. EAI has initiated the process of making WBI implementation and the DataIntegrator upgrade official projects.	41%	Green
		7/9/2004	ITA: Unfortunately last-minute technical issues prevented the completion of the Interwoven migration. We are on target for a 7/12 completion of the testing environment for eMPN in ITA. Student Aid on the Web and Schools Portal are being tested in their WAS 5.0 environments. Development and test environments have been completed for IFAP. ITA responded to 4 service requests this period. EAI: EAI is working closely with ITA on migrating eMPN to ITA. The transactional portion of the Message Status Inquiry Tool has been implemented in the development environment. EAI responded to 44 COD customer service requests.	41%	Green
35	**CIO**	*Support the FSA IT assets at the VDC with lines of service including, full and incremental backups, annual disaster recovery tests, disaster recovery location and services, quarterly capacity planning, annual penetration testing, test environment support, security, compliance to all appropriate FSA, ED, & Federal policies, regulations, statutes.*			
		7/16/2004	Continuing on schedule. Refresh is 90% complete.	90%	Green
36	**CIO**	*Continue Enterprise Quality Assurance Program to support the FSA CIO in conducting systems assessments and evaluations consistent with best practices for Solution Life Cycle (SLC) and Capital Planning and Investment Control (CPIC) processes.*			
		7/23/2004	Dan Callahan is coordinating the first In-Process Review (IPR) for CSB IV&V support with the CSB leadership and IV&V contractor, tentatively set for July 29. QA Team continuing to coordinate Post-Implementation Review for eZ-Audits Release 1 kickoff date with Molly Wyatt. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	81%	Green

FSA No	Area	Action Item			
		Status_Date	Comments	%Complete	Status
		7/16/2004	Final FY04 transfer of funds document was passed to Glenn Perrys office and OGC for review on 13 July 2004 by Deb Wrabley. Draft Acquisition Plan for re-compete and selection of new Post-Implementation Review support vendor under review by QA Team. QA Program Manager continuing to explore ROI methodology for QA Team activities. Consulting with Jim Coffman of FSA Contracts Performance Team in creating ROI model and processes. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	77%	Green
		7/9/2004	Final FY04 transfer of funds document was reviewed by Deb Wrabley and sent to Glenn Perry's office and OGC for review, ahead of the FSA Budget Office's July 30 deadline. QA Team and Trey Wiesenburg are conducting meetings with the EAC / Spring Conference coordination team to provide technical support on conference requirements and the new procurement process. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	77%	Green
37	CIO	Support ED, customers and business partners by participating in the President's Management Agenda E-Government initiatives.			
		7/23/2004	The GovLoans working group met on Wednesday, July 21, to discuss the GovLoans' progress toward its second release and official launch in late September 2004. Human Factors International presented official findings and recommendations from the usability testing conducted on June 29-30, 2004. ED/OCIO and FSA responded to an E-Authentication request for a government-wide "data call" from systems classified as "major" under the quarterly Federal Information Security Management Act (FISMA) Plan of Action and Milestones (POA&M). Students.gov received 53,535 visits (1.3 million hits) during the week of July 11 - July 17, 2004.	81%	Green
		7/16/2004	On July 13, the eLoans partner agencies met to discuss workgroup progress and next steps for moving forward. Students.gov received an estimated 55,533 visits (1.2 million hits) during the week of July 4 - July 10, 2004. On July 7, the students.gov team met with VDC technical staff to get the results of their investigation into discrepancies in the number of students.gov site visits reported by WebTrends. New dispatcher software installed at the VDC on May 30 defines site visits differently than the old software, so although the amount of activity hasn't actually changed, the number of visitors to students.gov will appear lower than in the past. This potentially affects every FSA site that uses WebTrends and migrated from eNetwork Dispatcher to the Cisco dispatchers. As a result, we will not have the basis for a meaningful comparison of visits before 5/30/04 and visits after 5/30/04.	77%	Green
		7/9/2004	On July 2, OMB and ED eLoans representatives met to discuss the eLoans Transition Strategy. Discussions centered around the proposal to bring the eLoans initiative to closure by (1) completing remaining work, (2) transitioning ownership to responsible partner agencies (e.g., GovLoans ownership transfers to DOL/GovBenefits), and (3) establishing a Public/Private Credit Council to oversee any remaining workstreams that require cross-agency input (including decisions on whether/how to proceed). Students.gov received an estimated 49,652 visits (1.2 million hits) during the week of June 27 - July 3, 2004. In June 2004, 243,397 visitors came to students.gov (5.8 million hits) - an increase of 13% from May. In June we added 265 new subscribers to students.gov InfoSource.	77%	Green
38	OMBD	Provide high quality information, research and informal problem resolution services to student loan borrowers and other participants in student aid programs.			
		7/23/2004	Weekly surveys of customer satisfaction with research and general assistance cases score 1.9 or less on a scale of 1-5 with 1 being HIGHEST. Ombudsman Office Overall service rating 1.68 (through 7/09/04)	79%	Green
		7/9/2004	Weekly surveys of customer satisfaction with research and general assistance cases scor 1.9 or less on a scale of 1-5 with 1 being HIGHEST. Ombudsman Office Overall service rating 1.67 (through 7/2/04)	75%	Green

FSA No	Area	Action Item			
		Status_Date **Comments**		**%Complete**	**Status**
41	**CMS**	*Plan and manage FSA conferences.*			
		7/23/2004	Achieved current customer satisfaction rating and reviews of FSA sessions were increased to 30%. This is complete.	100	Completed
		7/9/2004	-Once conference data documentation is submitted, this project will be complete.	99%	Green
42	**CMS**	*Manage, develop and update content for FSANet.*			
		7/23/2004	-On July 14, two updates were provided on FSAnet. The return of the Water Cooler and Senior Leadership notes. The Water Cooler contains three different forums: FSA Assists, FSA Car Pool and FSA Blackboard. FSA Assists is an online forum for FSA employees to pose questions to management about issues impacting FSA. Employees can ask questions publicly or privately. The FSA Blackboard is for employees to post announcements such as retirement celebrations, lost items, etc. -FSAnet web stats are still unavailable as it was determined that a software filter was not placed back into the web trends configuration file after the move from the network dispatcher to CSC. This is being corrected so we should have stats soon.	80%	Green
		7/9/2004	-FSAnet Assist was "soft" launched. It will be announced to employees on Monday, July 12.	75%	Green
43	**CMS**	*Manage controlled correspondence functions including FOIA, privacy and controlled mail.*			
		7/23/2004	Controlled Mail - 208 letters were handled and all are on time. FOIA cases - There were 9 new FOIA cases and 5 cases closed. Privacy cases - There were 4 new privacy cases and 2 cases closed.	80%	Green
		7/9/2004	Controlled Correspondence - 198 letters were handled by FSA and all were on time. FOIA cases - There were four new cases and seven cases have been closed.	75%	Green
44	**CMS**	*Develop and implement internal and external communications strategy.*			

FSA No	Area	Action Item			
		Status_Date	Comments	%Complete	Status
		7/23/2004	-Govt. Computer News should print an article on Terri/FSA on Monday, July 26. -Hot Issues List to Sec. Paige on time. -Daily newsclips on time. -FSA Weekly News to employees on time. -Weekly Report to Sec. Paige on time. -Lobby monitor is still being evaluated to find out why the large screen stopped functioning. A temporary, smaller screen is now operating in the lobby until the large screen can be fixed. Slides have been updated with the 7/15 Dashboard. -Information Requests - To date, 309 requests have been received while 21 are outstanding and one is on hold. The last three requests were: Wash. Post calling about the current scam where someone is impersonating an ED employee and asking students for their bank act numbers so they can get $8k in grant money to replace their loans; OLCA gave us a list of schools to be verified if they are Direct Loan schools or not; LEAP disbursements made after 120 days. -FSA Communications continues to help FSAU create a new employee orientation video. The secretary's videographer, FSA Comms and FSAU held a meeting to discuss the bad first draft. The videographer was given an "out" but declined as he wants to create something to please everyone and gets our message across to new employees. Next steps, new footage of students was filmed, will utilize some sceens from the ACS bid video, music will change, snaps will be quicker and FSA staff will go to FB6 and help "piece together" a quicker, more stimulating video. It's highly unlikely the video will be ready for the September new employees. The videographer's PC has had problems too and those are slowly being corrected.	80%	Green
		7/9/2004	-Article from Orlando Sentinel on consolidation was included in newsclips. -Terri Shaw has an interview with Govt. Computer News today. -Daily newsclips on time. -FSA Weekly News to employees on time. -Hot Issues List to Sec. Paige on time. -Weekly Report to Sec. Paige on time. **-Lobby Monitor crashed. CIO, ED & contractors are investigating what is broke. Lobby monitor will be taken down and replaced with a screen from the training center until it is fixed or replaced. This problem is still being evaluated. -Information Requests - To date, 295 requests have been received and 13 remain open and one on hold. The last three requests were: Cong. Mark Foley's office wants a meeting with ED and MedVance Institute concering the eligibility; Ann Clough is reqeusting LEAP/SLEAP data; Sallie Mae is asking for loan volume data.	75%	Green
46	EPMS	*Develop acquisition workforce.*			
		7/22/2004	The workforce continues to attend training as forecasted in the annual training plan. The ongoing training assessment and evaluation process continues to provide valuable information. The evaluation effort revealed that 75% of the individual training forecasted for FY 04 is complete or scheduled for completion by the end of the physical year. The ongoing organization re-engineering process within APCMG provides an opportunity to commit the remaining training budget. The re-engineering effort combined with other additional training, not previously forecasted, will bring this task to 100% completion by September 30, 2004 as projected.	75%	Green

FSA No	Area	Action Item			
		Status_Date	**Comments**	**%Complete**	**Status**
		7/9/2004	The workforce continues to attend training as forecasted in the annual training plan. A training assessment and evaluation process is scheduled for completion before the next reporting period. This will provide an overall evaluation of accomplishments so progress can be accurately reported. Otherwise there has been no change since the last two reporting periods.	60%	Green
47	**EPMS**	*Implement enterprise contract performance monitoring measures against new systems contract awards.*			
		7/22/2004	FEBI incorporation into the process is still dependent on the FEBI acquisition schedule. FEBI is in the evaluation phase and upon award FEBI will be incorporated into the process.	90%	Green
		7/9/2004	FEBI incorporation into the process is still dependent on the FEBI acquisition schedule. No change from last reporting period.	90%	Green
48	**EPMS**	*Continuously update and monitor procurement internal controls.*			
		7/22/2004	No change from last report.	90%	Green
		7/9/2004	While internal controls are in place establishing a baseline to assess success measures has proven difficult as FSA specific data is not easily severable from Department data. FSA has eliminated four (4) large sole source contracts to date this FY and anticipates only one extension. This result compares favorably with FY 03 in which 3 extensions were made. The existing reporting methodologies are currently being evaluated and techniques are being developed for acquiring the required data. Acquisition process measurements are underway with the establishment of timelines for various type of procurement. Refinement of those templates will be an on-going exercise. Initial contract performance measures are complete.	90%	Green
49	**EPMS**	*Increase contract dollars awarded to small businesses.*			
		7/22/2004	No change from last report.	95%	Green
		7/9/2004	Exceed FY 04 goals but still monitoring awards until the end of the FY. This task will carry over into the next FY as we continue to monitor contract dollars awarded to small businesses.	95%	Green
50	**EPMS**	*Continue to implement integrated project management oversight for FSA's system integration activities.*			
		7/23/2004	The PMO continues to roll FSA projects under their oversight. Activites during this reporting period included confirming with CIO staff all business cases presented to the IPC over the last year. Upcoming activites to include meeting with remaining PMs that presented and received funds via the IPC, describing the PM function and introduce them to the monthly reporting format (scorecard). Weekly scorecard updates to the IPC will resume 8/11/04.	75%	Green
51	**EPMS**	*Evaluate and implement selected project management standards based on the system development methodology (Solution Life Cycle).*			

FSA No	Area	Action Item			
		Status_Date	Comments	%Complete	Status
		7/23/2004	When this action item was developed, it was thought that the responsibiltiy for the SLC methodology would reside within the PMO (EPMS). That did not occur and subsequently, this became a part of the One Ed initiative under OCIO.	08%	Red
52	EPMS	*Restructure integration leadership support to transition the majority of responsibility to FSA staff.*			
		7/23/2004	Integration activites continue with the new contractor, Grant Thornton. Identifying the permanent group is part of the ASEDS org packet. It is anticipated that this will be completed prior to Spet 30.	70%	Green
53	EPMS	*Prepare and continually monitor and report on the accomplishments of the High Risk Plan.*			
		7/23/2004	General GAO's draft report on their high-risk review is in their internal review process. We should expect to receive in the next two weeks. Financial Management GAO staff came in on 6/15/04 for a briefing by CFO Vicki Bateman on the ABC model and on FSA's improper payments calculation methodologies. FSA and contractor staff made presentations, answered questions and left GAO with takeaways to inform their report. Since then, we received one question about when the cost models would be considered operational, and we responded that they would probably be considered in a production mode in spring 2005, when the reporting capabilities are implemented. Systems Integration GAO had a few more follow up questions about the number of systems retired in integration, the functionalities of retired and new systems, and the currency of FEBI and CSB documents on the Web. Katie Crowley responded promptly. GAO has developed a graphic for their report to depict our integration efforts. We have offered to review that and verify the accuracy. Program Integrity After the exit conference, FSA sent GAO a number of documents related to the comprehensive compliance review process, including training materials. Kay Jacks and FSA staff met with OIG staff on 7/12/04 to discuss issues raised in OIG's draft report on CMO in which they express serious concerns about the effectiveness of our monitoring and oversight efforts. FSA must respond to the draft report's conclusions and recommendations very explicitly. We must explain exactly what we do currently to mitigate the limitations of IAM, exactly what our plan and timeline are for developing and implementing the policies and procedures we lack in this area, exactly what we will do to monitor adherence to the same, and how we plan to ensure the eCMO initiative does not repeat the shortcomings of the current and past systems and models. PBO Management GAO asked us to resend an email they had received in late March with responses to a number of questions on human capital issues. They had lost the original in a move. Calvin Thomas sent them the latest draft of our Human Capital Plan, as we promised at the exit conference.	81%	Green
54	AWSS	*Deliver workforce development and support programs.*			

FSA No	Area	Action Item				
		Status_Date	**Comments**		**%Complete**	**Status**
		7/9/2004	None.		90%	Yellow
		7/9/2004	No information provided.		90%	Yellow
56	**CFO**	*Review Credit Reform estimates.*				
		7/29/2004	Project 56 was slow to start, in large part due to contracting issues, but is on track to be completed before the end of the fiscal year. Now that the legwork of calculating FY'04 credit subsidy estimates has been done and credit reform contract support is on board, we have begun to conduct an objective analysis of our business processes and estimation tools, and to identify opportunities for improvement. Those steps will intensify starting on Thursday, July 29th, as the team will meet with business owners to gather their requirements related to credit reform reporting.		47%	Green
		7/23/2004	OCFO and FSA/CFO posted the FY04 credit reform estimation journal entries to the June 30 financial statements. Also, contracted technical experts have developed outlines of papers that they will prepare for ED. The papers will provide an overview of ED's progress in addressing the credit reform reportable condition, and will make recommendations for future improvements. Over the next several weeks, they will gather additional data as needed from appropriate program managers.		47%	Green
		7/9/2004	The subgroups of the Credit Reform Work Group (CRWG) have continued to make progress. Budget Service provided CFO representatives a walk-through of the effects of the credit reform estimates on the appropriate general ledger accounts. The outside agencies subgroup distributed a discussion draft of observations and recommendations for improvement. Subteam representatives identified certain information and analyses that should be developed in order to better understand the estimates. The CRWG principals met on June 24 to review progress and status, and discuss next steps. Budget Service provided OCFO and FSA/CFO with the FY04 credit reform estimation journal entries to post to the June 30 financial statements.		40%	Green
58	**CFO**	*Support the implementation of Oracle Federal Financials Release 11i.*				
		7/23/2004	The FSA Oracle 11i support contractor continues to provide significant input into the Oracle 11i functional subteams, in the form of meeting participation, white papers, and continued requirements gathering work with FMS users. Working to finalize the FSA-specific requirements for initial O11ie-wide requirements review by early August. Provided O11ie team with 11 Rational ReqPro licenses, facilitating a more structured approach to requirements management Prepared draft data flow diagrams regarding Credti Reform accounting and reporting options for both CSB and the FFEL program (GA and Lenders) Completed initial drafts of configuration matrices of the FSA FMS v11.03 configuration for each Oracle module.		74%	Green

FSA No	Area	Action Item			
		7/9/2004	The FSA Oracle 11i support contractor continues to provide significant input into the Oracle 11i functional sub-teams, in the form of meeting participation, white papers, and continued requirements gathering work with FMS users.	69%	Green
			The FSA team has provided feedback on the IV&V contractor's project management plan and on the ACCS/Multi-Org CRP Setup document.		
			The FSA team has initiated the requirements coordination activities, where a contractor staff will be responsible for communicating 11i requirements to other FSA initiatives, collecting other FSA initiative requirements, and coordinating implementation schedules.		
59	CFO	Implement automated budget funding entry solution.			
		7/23/2004	FMS and EDCAPS contractors are currently developing the code. The FMS contractor will finalize their test scripts this week and the EDCAPS contractor is also completing test scripts. Regular meetings continue, ensuring that the EDCAPS contractor, FMS contractor, OCFO, and FSA CFO all develop code and test in unison. The project continues on-schedule and on-budget.	65%	Green
		7/9/2004	Having completed the technical designs, the FMS and EDCAPS contractors are currently developing the code. Regular meetings continue, ensuring that the EDCAPS contractor, FMS contractor, OCFO and FSA CFO all develop code and test in unison.	55%	Green
61	CIO	Implement Enterprise Data Strategy initiatives.			
		7/23/2004	Overall project on schedule. Please see milestones for specific updates.	66%	Green
62	BS	Begin the implementation of Common Services for Borrowers (CSB).			
		7/26/2004	The success measure for item 62.2 of the annual plan is to begin migration of the legacy Loan Consolidation system into the CSB by July 2004. The CSB transition team has begun migrating the new CSB loan consolidation functionality into the CSB environment. All five development releases within Phase 1 are in test. However, schedule slippage has occurred with a new implementation date of October 2004 for Phase 1. The project status remains yellow.	80%	Yellow
			Data conversion for all "in process" Loan Consolidation data, and for all Direct Loan Servicing demographic data is progressing well. Fewer data issues are being identified and those that are identified are being resolved.		
63	ADS	Improve school partner oversight.			
		7/23/2004	The IPC on 7/14/2004 approved the requested scope changes to milestones 63.1 and 63.6 and the cancellation of milestone 63.8. See the milestone updates for detailed information.	88%	Green
		7/9/2004	At this time, we are requesting title and scope changes for milestone 63.1, title and scope changes for milestone 63.6, and cancellation of milestone 63.8. See the milestones for details.	77%	Green
			In conjunction with the these milestone changes, we also need to request a date change for the project. With the cancellation of milestone 63.8, the target completion date for the project would be 8/30/2004.		

FSA No	Area	Action Item			%Complete	Status
		Status_Date	Comments			
67	ADS	*Prepare to implement IRS data match.*				
		7/23/2004	The IRS Workgroup has finalized a presentation for the Management Council that summarizes the work that the group has done to date and provides an overview of five possible IRS match scenarios. The Workgroup is scheduled to make its presentation to the Council on 8/11/04.		78%	Green
			Jeanne Saunders and Dan Madzelan presented two IRS Match sessions at the NASFAA Conference in Minneapolis the week of July 19th, 2004. Session attendees participated in a discussion during the presentation and provided their thoughts and ideas for implementation.			
		7/9/2004	The IRS Workgroup has finalized a presentation for the Management Council that summarizes the work that the group has done to date and provides an overview of five possible IRS match scenarios. The Workgroup is scheduled to make its presentation to the Council on 8/3/04.		78%	Green
			The Workgroup continues to meet to develop a high level plan for conducting an IRS demonstration pilot in the first year(s) of implementation.			
			In addition, the Workgroup is presenting two IRS Match sessions at the NASFAA Conference in Minneapolis in July 2004.			
68	AWSS	*Continue Learning Coupon program.*				
		7/26/2004	As of 7/16 approximately 263 staff have used their coupon, which is 63% of our goal. $114,505 has been obligated, which is 57% of our goal.		30%	Yellow
69	AWSS	*Provide Career Zone services.*				
		7/9/2004	The Career Zone introduced a new Guest Speaker Series in June with a presentation by Max Larsen from the Gallup Organization. He discussed the Strength Finder assessment frm the book titled, "Now Discover Your Strengths. The presentation was attended by 25 FSA staff and recieved very positive feedback. The Career Zone is preparing for it's regional visits to New York and Philadelphia scheduled for July 28th and 29th. The purpose of these visit(s) is to provide regional staff with access to Career Management and Developmental Services.		75%	Green
70	ADS	*Increase Student Financial Aid program awareness.*				
		7/23/2004	The two Milestones associated with this project (70.1 & 70.2) have been rolled into the Front End Business Integration (FEBI) small business initiative, now known as 'Federal Student Aid Integrated Enterprise Communications (FSAIC)'. This initiative will result in a contract award for a marketing and outreach provider by 9/30/04. Market research is complete. A request for quotes and an invitation to offerors has been sent to ten potential vendors. Past performance is due 8/2/04 and oral presentations are scheduled for 8/09/04 through 8/12/04.		55%	Green

FSA No	Area	Action Item			
		Status_Date	Comments	%Complete	Status
		7/9/2004	The two Milestones associated with this project (70.1 & 70.2) are now rolled into the Front End Business Integration (FEBI) Small Business Initiative. This initiative will result in a contract award for a marketing and outreach provider by 9/30/04. Market research is complete. The Contracts Review Board has approved draft SOO and invitation to offerers. Request for capability statement posted on GSA Advantage June 17th. Capability statements were received June 30th and have been reviewed and evaluated. On track with project calendar.	50%	Green
71	ADS	Reengineer EDExpress.			
		7/23/2004	FSA Acceptance Testing is scheduled for the week of August 16th. The PRR is tentatively planned for early September. The System of Records Notice (SORN) is awaiting sign off by management at OCIO, and then it will be posted to the Federal Register for a thirty-day comment period. The anticipated completion of the clearance process is by late August.	95%	Yellow
		7/9/2004	The contractor has delivered a schedule for the new release of Return to Title IV Funds on the web software. The PRR is tentatively planned for early September.

The System of Records Notice (SORN) is awaiting sign off by management at FSA and then will be posted to the Federal Register for a thirty-day comment period.   The anticipated completion of the clearance process is by late August.

This product is non-year specific and delaying the posting will not impact schools adversely. There is currently a PC product that is available. However, we would like to post the product before the 04-05 academic year begins in the fall of 2004. | 95% | Yellow |
73	CIO	Develop FSA Security and Privacy Architecture Pilot.			
		7/27/2004	The success measures have been met for this reporting period (FY04) and this item is being closed accordingly. For this reporting period, we have identified leading candidates for identity and access management products based on the business drivers derived in data strategy. We have completed selected vendor product demonstrations for identify and access management enterprise tools. The task has also completed analysis of the products and provided results to FSA CIO and the Business units through BTIG presentations. The task also has briefed Security Officers on the tools and activities related to this security architecture initiative. The team had discussions with the CSB architecture and Security Team to ensure compatibility of the selected tools with CSB implementation and their requirements. The task has completed pilot implementation with ezAudit and X-sites at the VDC using the Tivoli set of products from IBM. Recent updates to this measure have been updates on additional work continuing around security architecture above and beyond those originally planned for in FY04. This work will be reported on in FY05 via a new performance measure. This is the last update that will be provided until then.	100	Completed
		7/23/2004	Continuing discussions with IPM and BTIG. Have given a draft SOO to ILSC vendor. Waiting for gaps and feedback. Currently working on a govt cost estimate.	100	Green
		7/16/2004	Met with the IPM and Enrollment access management teams to determine the touch points between Security Architecture and IPM. Presented te finding to the relevant business users. Modified the draft SOO for the conceptual design. The SOO is to be given to the ILSC contractor.	100	Green

FSA No	Area	Action Item			
		Status_Date	Comments	%Complete	Status
		7/9/2004	Meeting with IPM and other business owners to clearly identify touchpoints with the security architecture. Revised the draft SOO based on feedback from BTIG.	48%	Green
74	AWSS	*Implement Leadership Excellence development training.*			
		7/23/2004	FSA is finalizing its updated Human Capital Plan which will provide direction for leadership development at FSA. The 360 assessment planned for FY04 will be built into managerial development activities to be built and delivered in FY05 and beyond.	75%	Yellow
		7/9/2004	No activity to report.	66%	Yellow

FSA Milestone Status Report

FSA No	*Area*	*Action Item*			
		Milestone# *Action Item*			
		Status Date *Comments*		*%Complete*	*Status*

1	**ADS**	*Implement student aid awareness initiatives.*		

1.1 Leverage partnership activities to disseminate FSA information.

	Status Date	Comments	%Complete	Status
	7/23/2004	SAA participated in 3 continuing partnership activities - June 22 –24, partnered with Region 7 staff to exhibit materials at the 2004 SkillsUSA Conference. On July 14 & 15, participated in the Intel Computer Clubhouse Teen Summit in Boston, MA. Clubhouse students, parents and coordinators from around the world engaged in activities designed to focus their attention on college and career choices. The event, which was held at the Boston Museum of Science, provided attendees a variety of ways to explore college and career choices ranging from demonstrations on robotics to the opportunity to hold a snake. SAA contributed to the event by exhibiting financial aid materials and presenting information about Student Aid on the Web. The international students who are considering attending colleges in the U.S. were particularly impressed that they could use the Web site to research colleges in the U.S. and find out about requirements to study in the U.S. like "student visas." July 20, presented information on Student Aid on the Web and how to avoid scholarship scams at the First Federal Interagency American Indian/Alaska Native Intern Open House sponsored by USDA. The theme of the meeting was "Continuing the Generations into the Next Millennium."New partnership – July 7 –9, annual LULAC (League of Latin American Citizens) convention in San Antonio, TX. Exhibited materials and presented information on federal student aid programs and Student Aid on the Web.New activity - July 13-17, answered questions and distributed federal student aid information to teachers who convened for the annual American Federation of Teachers (AFT) Conference held in Washington, DC.	100%	Complete
	7/9/2004	SAA participated in 2 continuing partnership activities - June 26 – 28 exhibited materials at the annual PTA convention in Anaheim, CA. June 29 – July 5 disseminated information at the National Federation of the Blind conference in Atlanta, GA. Three new outreach activities – June 23 – presentation in Washington, DC to high school students attending the National Native American Youth Initiative about the federal student aid application process. June 25 –29 exhibited materials at the American Library Association convention held in Orlando, FL. and June 27 – 30 at the American Counselors Association convention in Reno, NV.	100%	Complete

1.2 Publish accurate and timely information that meets the needs of our audience.

	Status Date	Comments	%Complete	Status
	7/23/2004	Designer chosen from GPO for Guide. Update given to GPO based on comments from usability re cover design. GPO designer to provide 3 mockups and will proceed according to updated info. Text of Guide is being revised.	18 %	Green
	7/9/2004	Meeting was held with GPO last week to discuss design work for The Student Guide. Text of Guide is being revised.	17 %	Green

1.3 Disseminate information directly to target audience.

7/23/2004   Student Aid Awareness (SAA) disseminates information directly to target audiences through partnerships, training, college fairs,   75 %   Green
financial aid nights and other activities. As of 7/23/04, SAA has provided federal student aid information and distributed
materials to approximately 80,279 persons as follows:

June 22-24, 2004	USA Skill Conference	700
June 26-29, 2004	National PTA	750
June 29-July 6, 2004	National Federation of the Blind	400
July 6-9, 2004	League of United Latin American Citizens	750
July 13-15, 2004	American Federation of Teachers	200
July 14-15, 2004	Intel Computer Clubhouses	200
July 20, 2004	USDA Intern Program	60

During FY03, SAA distributed materials to approximately 103,400. Our Outreach plans for the summer and early fall should
position SAA to meet our goal. In addition to our direct dissemination activities, we also reach our targeted populations via
partners/intermediaries. See goal 1.1.

7/9/2004   Student Aid Awareness (SAA) disseminates information directly to target audiences through partnerships, training, college fairs,   73 %   Green
financial aid nights and other activities. As of 7/9/04, SAA has provided federal student aid information and distributed materials
to approximately 77,179 persons as follows:June 23, 2004   National Native American Youth Initiative   60
June 26-29, 2004   American Library Association   700June 27-30, 2004   American School Counselor
Association   300   During FY03, SAA distributed materials to approximately 103,400. Our Outreach plans for the summer
and early fall should position SAA to meet our goal. In addition to our direct dissemination activities, we also reach our targeted
populations via partners/intermediaries. See goal 1.1.

1.4   Respond accurately and timely to requests.

7/23/2004   For the period 7/5/04 –7/16/04, the Editorial Services Contract responded to the following correspondence: 99 %   Green

97 controls--- (72 prior period)--------------turnaround (3 days)=83%
1117 non-controls--- (1226 prior period) —turnaround (2 days)=100%
2008 e-mails--- (2200 prior period)-----------turnaround (2 days)=100%

7/9/2004   For the period 6/21/04 –7/2/04, the Editorial Services Contract responded to the following correspondence:72 controls--- (67   99 %   Green
prior period)--------------turnaround (3 days)=100% 1226 non-controls--- (1155 prior period) —turnaround (2 days)=100%2200 e-
mails--- (1866 prior period)-----------turnaround (2 days)=100%

1.5   Reach customers through Student Aid on the Web.

7/23/2004	Student Aid Awareness uses the WebTrends program to record the use of our website Student Aid on the Web (SAOTW). The number of visits and hits are the key indicators of the use of SAOTW. The number of visits and hits for this reporting period (07-04- to 07-17-04) are 747,127 and 12,976,215 respectively. During the same period last fiscal year we had 602,749 visits and 9,471,779 hits. This represents FY04 increases of 23.9% for visits and 37% for hits over FY03. MyFSA, the Student Aid on the Web feature that allows students and parents to establish their own personal password protected accounts for use as they move through the financial aid life cycle has recorded 40,918 new accounts since SAOTW went live September 7, 2003. Information entered in their personal profiles can be saved and used to electronically pre-populate much of the FAFSA application and make application for admission to college. The MyFSA feature has only been available since September of 2003.	100%	Complete
7/9/2004	Student Aid Awareness uses the WebTrends program to record the use of our website Student Aid on the Web (SAOTW). The number of visits and hits are the key indicators of the use of SAOTW. The number of visits and hits for this reporting period (06-20- to 07-03-04) are 780,275 and 14,626,078 respectively. During the same period last fiscal year we had 547,574 visits and 8,347,597 hits. This represents FY04 increases of 42.5% for visits and 75.2% for hits over FY03. MyFSA, the Student Aid on the Web feature that allows students and parents to establish their own personal password protected accounts for use as they move through the financial aid life cycle has recorded 39,168 new accounts since SAOTW went live September 7, 2003. Information entered in their personal profiles can be saved and used to electronically pre-populate much of the FAFSA application and make application for admission to college. The MyFSA feature has only been available since September of 2003.	100%	Complete

2   **ADS**   *Improve customer interaction through customer feedback particularly at the Customer Service Call Center (CSCC).*

2.1   Monitor customer feedback to improve services.

7/23/2004	Progress continues as follows: Lotus Notes Enhancement - As a result of continuing meetings with EZ Audit staff, a recommendation was made to enhance our Lotus Notes software. The software was revised since our last reporting period so that when a reminder email was sent to an employee regarding an overdue inquiry, the email will include the name, phone number, email address (if available) and the incoming question. This will help the employee remember what the particular case was about without having to go into the Lotus Notes system. Customer Feedback - We reported (last time) about a suggestion that came in from Bill Zahn of University of NC-Greensboro for an improvement to the email notices that go to students who submit their FAFSAs on the web. The suggestion was forwarded to the Application Processing Division. They accepted the suggestion and will implement a change for the upcoming 2005-06 processing cycle. This improvement will make it clearer to the student that he/she must look at his/her FAFSA data to ensure that it was processed properly and to avoid missed deadlines.	81 %	Green

			7/9/2004	Progress continues as follows:	77 %	Green

Web Search Replacement - Indus continues to support OCIO during their replacement of Autonomy Search Engine with a Google search engine.

EZ Audit - Meetings continue between EZ Audit and CSCC staff. The previous June 30th deadline did cause CSCC's phone volume to increase over the past 3 weeks; however, it returned to normal after the deadline. Our next peak is expected in December 2004. We have, however, come up with some additional ideas that may make the process easier in the future. We are beginning to investigate such changes.

Customer Feedback - Bill Zahn of University of NC-Greensboro had a situation where a student submitted her Renewal application which was processed in February. The email notification that she received indicated that her form had been processed and that if she wished to view the results, she could go to a designated URL. It did not, however, indicate that she MUST review the data as there MAY be some inconsistencies or problems which would have to be resolved prior to her receiving any financial aid. She did not follow up and was unaware that her application was actually rejected until her deadline (in May) for submitting a valid ISIR had passed. Mr. Zahn suggested that the email notification be improved to encourage students to look at their application results as further action on their part may be necessary in order to receive aid. This suggestion was forwarded to the Application Processing Division staff for consideration for the 2005-06 processing cycle.

IFAP Subscription Service - At the end of June 2004, our membership reached 5,230 members, which is 111 additional subscribers since the previous month. This is a 26% increase since the beginning of FY 2004.

6	**ADS**	*Administer Campus-Based (eCB) activities.*				
		6.5	Issue FISAP software release.			
			7/23/2004	The FISAP software was posted to the e-CB web site on 7/18/2004. The milestone has been completed.	100%	Complete
			7/9/2004	FISAP testing has been completed, and corrections are now being incorporated into the eCB System. FISAP software will be issued to schools the week of 7/12/2004.	93 %	Green
8	**ADS**	*Expand eZAudit initiative.*				
		8.1	Be Prepared for Contract Award.			
			7/23/2004	Market research interviews begin 7-22 through 7-28. SOW went to Accenture. Proposal due back this week. Award of Task Order within 2 weeks.	75 %	Green
			7/9/2004	Market research began (companies were selected). Finalized SOW. Requested funding for the development of required reporting (17) for operational and OMB support.	72 %	Green

		8.2	Complete first full cycle of processing (all school types).		
			7/23/2004	As of 7-18, 4,267 annual audit submissions have been rec'd. 1,743 submissions have passed the QC screening. We will monitor this workload to assure timely processing.	78 %	Yellow
			7/9/2004	As of 7-04-04, 4,090 annual audit submissions have been rec'd. The large increase from the previous reporting period is due to the June 30 reporting deadline for those proprietary schools that have a FY end of 12-31 and over 700 submissions from the FY 02 reporting period. 1,454 submissions have passed the QC screening. We will monitor this workload to assure timely processing.	75 %	Yellow
		8.3	Improve audit review component of our compliance activities by increasing the e-submission rate to 95%.		
			7/23/2004	As of 7-18-04, 3,186 schools have registered, about 73% of all schools.	73 %	Green
			7/9/2004	As of 7-05-04, 3,150 schools have registered, about 72% of all schools.	72 %	Green

9	**ADS**	*Enhance program monitoring and oversight.*		
		9.1	Meet or exceed audit resolution rate of 95% by the end of the fiscal year.		
			7/23/2004	For the biweekly period 7-5-04 to 7-18-04, 96% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. We are continuing to monitor this closely. There are 20 audits on administrative stay. The audits on administrative stay are not included in the calculation of the performance measure. These audits have complex issues, and we do not know when they will be resolved. The effect of 20 audits on the performance of FSA's annual workload of 4000 - 5000 audits is about one half of 1 percent.	75 %	Green
			7/9/2004	For the biweekly period 6-22-04 to 7-04-04, 95% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. We are continuing to monitor this closely. There are 20 audits on administrative stay. The audits on administrative stay are not included in the calculation of the performance measure. These audits have complex issues, and we do not know when they will be resolved. The effect of 20 audits on the performance of FSA's annual workload of 4000 - 5000 audits is about one half of 1 percent.	70 %	Green
		9.2	Continue to measure school monitoring to assess overall compliance trends.		

	Milestone#	*Action Item*

	Status Date	*Comments*	*%Complete*	*Status*
	7/23/2004	For the first 3 qrts of FY 04, SEC conducted a comprehensive review of 1,990 unduplicated schools, or 32% of the total population, covering 37% of Title IV funding. An add'l 152 schools received an on-site program review and 84 schools received an on-site technical assistance visit.	72 %	Green
		On 7-14, Fin Partners decided to initiate certain changes at the NSLDS that will provide simplified options for transfer student monitoring for institutions with additional locations. Therefore, we are delaying further contact with institutions that do not yet have transfer student monitoring profiles for one or more of their additional locations. We are continuing to contact institutions where the main campus only has not yet established their profile. More info on school options for locations to be forthcoming in another week.		
		Case Team actions have reduced the number of schools and additional locations without the required NSLDS transfer student monitoring profiles by over 41%. The number of schools and locations without required profiles is down from 2,356 on 3/17/2004 to only 1,319 on 7/13/2004.		
	7/9/2004	Case Team actions have reduced the number of schools and additional locations without the required NSLDS transfer student monitoring profiles by over 32%. 735 new profiles have been established reducing the number without required profiles down from 2,356 on 3/17/2004 to only 1,509 on 6/25/2004. Training is on track.	70 %	Green
		The Administrative Actions & Appeals Division has received 62 referrals for administrative action and initiated 13 debarments from 10-01-03 through 7-06-04.		
9.3		Conduct School Relations initiatives.		
	7/23/2004	Under guidance from the original findings, the HBCU Perkins default database now reflects data from all of the HBCU schools and is in the process of including their Cohort Default rates. It is planned to be finished in the coming week.	88 %	Green
	7/9/2004	HBCU Perkins default has been analyzed and outreach is in the planning stages.	85 %	Green
9.4		Conduct the Experimental Sites initiative.		
	7/23/2004	Work continues, but no significant change in status. ASEDS is working with CIO to fund the updates to the reporting mechanism for the next cycle of data submission and analysis.	90 %	Green
	7/9/2004	ASEDS received the first draft of the preliminary report on the results from the experiments during academic year 2002-03. Staff in FSA's Operational Performance Analysis/Reporting & Internal Review Group continues to analyze the data submitted by Experimental Sites Schools. Staff will schedule a meeting in July to discuss preliminary findings, particularly areas that are drastically different from the previous year's report.	90 %	Green
9.5		Administer the Quality Assurance program.		
	7/23/2004	Work continues, but no significant change in status. The dry run of WebEx training on Phase I of the ISIR Analysis Tool took place on July 12 and the training sessions are scheduled to begin the week of July 26, 2004 and conclude by mid-August 2004.	88 %	Green

| | | | 7/9/2004 | Phase I of the ISIR Analysis Tool became available to schools just prior to the expected June 30 release date. The QA Program Staff continue developing guidelines, FAQs, and have scheduled close to 15 training sessions – via Webex in July and August -- for QA schools. A training dry run is planned for July 12 and the training sessions are scheduled to begin the week of July 26, 2004. | 87 % | Green |

| | | *9.6* | Conduct vulnerability assessment. | | | |

| | | | 7/23/2004 | Work this reporting period focused on internal controls and vulnerabilities in monitoring schools that deliver Title IV aid. During the next reporting period, work will include more focus on identifying vulnerabilities around student identification and authentication.

The work for this milestone continues on track for completion by the 9/30/2004 end date. As noted in earlier updates, the work on this milestone did not begin in earnest until May 2004. At that time, an 8-step approach over a 4-month period was developed. Currently, we have completed half of the steps according to schedule. Work will continue to complete the remaining steps in August and September. | 40 % | Green |
| | | | 7/9/2004 | The team leader continues to meet with subject matter experts in school eligibility, oversight, and systems processing. Work this reporting period focused on identifying existing and planned ASEDS internal controls for preventing improper payments to Title IV schools. Additional research and interviews with subject matter experts are planned for the next reporting period. | 35 % | Green |

| 10 | **ADS** | *Produce school publications and materials.* | | | | |

| | | *10.1* | Annually update and disseminate the Federal Student Aid Handbook. | | | |

| | | | 7/23/2004 | There has been no development in this project again this week. This project may need Terri's help to get through the POC review process. | 70 % | Red |
| | | | 7/9/2004 | The project is holding steady at the moment and remains on track thanks to going back green during the last reporting period. | 70 % | Green |

| | | *10.2* | Update and disseminate Direct Loan Program publications such as the Entrance and Exit Counseling Guides and promissory notes. | | | |

| | | | 7/23/2004 | The PLUS Basics brochure is designed and was reviewed by management and the Direct Loan Coalition last week. Final edits will be completed this week and the document will be submitted to OPA. Once approved, it will be submitted for printing. The students brochure will be finalized shortly after the PLUS is complete.

Currently, there are 57 back-ordered requests for publications or documents at the warehouse. These requests continue to be for the out of stock Direct Loan PLUS Basics brochure. As previously noted, schools have been informed that we are revising the brochure. | 81 % | Green |

			7/9/2004	The PLUS Basics brochure has been designed and final comments have gone back to the Publications group to incorporate into the draft. Management has made decisions on final revisions, and the revised draft will be provided to the Direct Loan Coalition at the 7/12/2004 meeting for a brief review. Following that, it will be submitted to OPA and then printed. The students brochure will be finalized shortly after the PLUS is complete.	77 %	Green
				Currently, there are 52 back-ordered requests for publications or documents at the warehouse. These requests continue to be for the out of stock Direct Loan PLUS Basics brochure. As previously noted, schools have been informed that we are revising the brochure.		

13 **BS** *Enhance program monitoring and oversight.*

13.1 Default Recovery Rate on FSA-held portfolio 9.5% or more by the end of the fiscal year.

			7/23/2004	Total non-consolidation recoveries reached $1.321 Billion, an increase of 24 percent from the same period, thru July 16, 2004, in FY03. This represents 8.30 per cent of the FY04 portfolio balance.	80 %	Green
			7/8/2004	Total non-consolidation recoveries reached $1.247 Billion, an increase of 24 percent from the same period, thru June 30, in FY03. This represents 7.84 per cent of the FY04 portfolio balance.	80 %	Green

13.2 Update FSA-wide risk management and default prevention inventory.

			7/23/2004	The Default Prevention Workgroup will meet July 30 to reach a final agreement on strategies and the tracking of initiatives. The team has divided the initiatives into two categories: "established production" and "tried and not implemented into production".	85 %	Green
			7/8/2004	The Default Prevention Workgroup met and further refined the definitions of the strategies focused on default prevention. They are:	75 %	Green

·Communications - Provide information or outreach of a general nature to the general public, lenders, potential borrowers, schools, or other agencies - usually in a group setting.

·Default Collection - Efforts undertaken to encourage voluntary resolution or enforce involuntary resolution of defaulted student aid debt.

·Performance Measures - Involves identifying sources of data and determining how it might be used to calculate a measure of the effectiveness of default prevention activities.

·Program Integrity - To promote integrity in the student loan programs by ensuring that: the correct loan amounts are disbursed to eligible borrowers; borrowers honor loan obligations; FSA collects on defaulted obligations.

·Technical Assistance – Cultivate communications between FSA and a school, servicer, guarantor, or other agency to resolve a specific issue or address training need. These services will most commonly be delivered to individuals or small groups.

·Tools for Aversion - Initiatives and process for mitigating and reducing risk of delinquency and/or default.

		13.3	Complete the work on the implementation of the life-time default rate measure.			
			7/23/2004	The Risk Management Group will continue to extract information from the NSLDS for FFEL loans for cohort years 1994-1998. Direct Loan calculations, based on the year of origination, are complete for consolidated and non-consolidated loans for 1994-1998.	85 %	Green
			7/8/2004	The lifetime default rate measure will be calculated from two different points, one from the date of origination and the other from the date the borrower entered repayment. Validation of the Direct Loan calculation for the lifetime default rate, from the time the borrower enters repayment, will be conducted initially. Subsequently the FFEL calculation will be completed.	80 %	Green
		13.4	Identify new and enhance current delinquency/default prevention tools for the Direct Loan Program.			
			7/23/2004	The statistics for the cure rate of delinquent loans are released monthly. The next report on this item will be issued mid-August. This item will be carried over to 2005, the objective being to increase the cure rate in FY 2005 using the rate at the end of FY2004 as the baseline.	80 %	Green
			7/8/2004	The goal to increase the cure rate on 181-360 day non-consolidated Direct Loans by 1 percent over FY2003 was achieved in April. The goal for FY2004 is 55.1 percent. The actual rate for June 2004 was 59.5 percent.	80 %	Green
		13.5	Conduct vulnerability assessment.			
			7/23/2004	The independent Verification and Validation (IV&V) team is continuing to review the functional requirements, detailed designs, and test plan.	80 %	Green
			7/8/2004	The independent Verification and Validation (IV&V) team is continuing to review the functional requirements and test plan.	80 %	Green
16	**FPS**	*Perform National Student Loan Data System (NSLDS) maintenance and operations activities.*				
		16.1	Perform cohort default rate calculations, send, and post.			
			7/23/2004	The next rate calculation is scheduled for Saturday, 7.31.2004 for the official cohort default rates. NSLDS participated in the Default Rate Coordination meeting held on Wednesday, 7.7.2004.	51 %	Green
			7/9/2004	The next rate calculation is scheduled for Saturday, 7.31.2004, for the official cohort default rates. NSLDS participated in the Default Rate Coordination meeting held on Wednesday, 7.7.2004.	51 %	Green
		16.2	Prepare guaranty agency fee calculations and send. Review Forms 2000 reasonability data against summarized NSLDS data.			

					%Complete	Status
			7/23/2004	The next LPIF calculation is scheduled for Friday, 8.13.2004.	75 %	Green
			7/9/2004	The next LPIF calculation is scheduled for Friday, 8.13.2004.	75 %	Green

16.3 Review, evaluate, and prepare guaranty agency NSLDS data integrity improvements reports and benchmarks.

					%Complete	Status
			7/23/2004	The June Guaranty Agency Benchmarks were completed, reviewed and distributed. The edit passage rate for the month dropped slightly to 98.14%.	76 %	Green
			7/9/2004	The June Guaranty Agency Benchmarks were completed, reviewed and distributed. The edit passage rate for the month dropped slightly to 98.14%.	76 %	Green

16.6 Provide monitoring functionality of GA and lender reasonability on a monthly basis.

					%Complete	Status
			7/23/2004	Review of the draft detail design from the previous contractor was completed. Lender reasonability matrix is under construction. A meeting was held to review possible edit changes. Meetings were held on Data Strategy and Oracle 11i to determine the use of the data from this task order.	59 %	Green
			7/9/2004	Work on this task order began on Monday, 6.28.2004. The detail design documentation from the previous contractor will be used for this task order. Programming for GA reasonability should begin shortly. Lender reasonality requirements gathering began on Thursday, 7.1.2004. Work on lender reasonability is being coordinated with Data Strategy and Oracle 11i work.	58 %	Green

19   **FPS**   *Perform maintenance and operations activities for the Financial Partners Data Mart.*

19.1 Provide a quarterly status report on ways to improve effectiveness and efficiency of Data Mart review process.

					%Complete	Status
			7/23/2004	The team is reviewing several reports to determine if some of these reports are still valid.	88 %	Green
			7/9/2004	FP staff continues to validate the data mart, (several minor changes were recommended.) June report submitted.	87 %	Green

19.2 Quarterly evaluation of use and value added to the guaranty agency and lender review processes.

					%Complete	Status
			7/23/2004	The deficiency code was a keying error; this record will be resubmitted with the next data mart load.	87 %	Green

			7/9/2004	Form 2000, LaRS, and NSLDS June data was loaded with no discrepancies. PEPS feed contained a record with a deficiency code of "9654", this record was not loaded and the issue is being researched. June report submitted.	85 %	Green
		19.3		Monitor Data Mart feeds in order to provide accurate, concise and timely data to users.		
			7/23/2004	FMS Ops timeframe to complete enhancement of the process to create a CR to send only a unique record each month is Tuesday, 8.31.2004.	91 %	Green
			7/9/2004	FMS has now requested FPDM Ops to create a CR to only send unique record each month.	90 %	Green
20	FPS	Perform Financial Partners Portal operations activities.				
		20.1		Monitor and evaluate web page hits to drive future postings to portal.		
			7/23/2004	The following items were posted on the FP Portal: FFELP Special Allowance Rates, Current Treasury Bill and Commercial Paper Rates. A Lenders/Servicers satisfaction survey notice was also posted.	96 %	Green
			7/9/2004	The LEAP/SLEAP page on the portal has been revised (several items have been added such as Performance Report, 2004-005 Application, LEAP and SLEAP at a glance). June report submitted.	95 %	Green
		20.2		Maintain current and relevant information to financial partners' user community.		
			7/23/2004	The contractor redesigned the What's New template to eliminate the page limitation.	92 %	Green
			7/9/2004	The Contractor is still researching this issue. A recommendation will be presented to the team on July 8th. June report submitted.	90 %	Green
		20.3		Obtain/evaluate feedback from financial partners' user community on value of information posted on the Financial Partners Portal.		
			7/23/2004	All suggestions and enhancements submitted by the user community have been implemented to the FP Portal. This action item is now completed.	100%	Green
			7/9/2004	A more visible link will be added to the portal, this link will included items such as Forms 2000, LAP and LARs instruction.	97 %	Green
21	FPS	Perform Leveraging Educational Assistance Partnership/ Special Leveraging Educational Assistance Partnership (LEAP/SLEAP) activities.				

			21.3	Review and approve applications from states. Obligate, generate, and mail grant award notifications to states.		
				7/9/2004	All applications received were processed. Grant award notifications were scanned to PDF and forwarded electronically. There were five states and three territories that did not apply for 2004-2005 funding. New Mexico, one of the states, has been granted exception to the deadline due to turnover at the state and intends to apply.	100%	Complete
22	**FPS**	*Perform Voluntary Flexible Agreement (VFA) activities.*				
			22.2	Prepare performance measure assessment and benchmarking reports.		
				7/23/2004	FPS is responding to questions/comments associated with the DRAFT report that was forwarded for comments on Friday, 7.9.2004. The DRAFT report is modeled after the existing FSA Benchmark report and it is being modified to more clearly represent the data.	96 %	Green
				7/9/2004	Evaluation of the best sources for the data to feed the performance measures was completed the week of June 28th and the draft report will be forwarded for comments on Friday, 7.9.2004.	95 %	Green
			22.3	Evaluate new applications for VFA.		
				7/23/2004	FPS is responding to questions/comments associated with the DRAFT process document that was forwarded for comments. Initial timeframes for completing the process steps have not been achieved for the NSLP/EAC VFA request or the USAF request. The timeframes are based on having a dedicated FTE assigned to completing the tasks and that is not the current environment due to conflicting priorities. To address this situation, tasks are being shifted from the DC to Regional staff.	99 %	Green
				7/9/2004	The draft process document has been forwarded for comments. It is also being used to gauge the processing time associated with the NSLP/EAC VFA request.	99 %	Green
			22.4	Foster effective working relations with guaranty agencies during scheduled site visits.		
				7/23/2004	FPS met with CSAC/EdFund in a "face to face" meeting on Wednesday, 7.14.2004, to inform them that the existing VFA agreement was not cost neutral. FPS and CSAC/EdFund will be working in the coming weeks to restructure the agreement to achieve cost neutrality and to re-align it with the current direction being set for new VFA's.	82 %	Green
				7/9/2004	Financial Partners Services continues to work closely with the guaranty agencies on a daily basis to continue the development of effective working relationships.	80 %	Green
23	**FPS**	*Perform maintenance and improvements to the Financial Partners' Electronic Records Management (ERM) system in order to enhance use.*				
			23.1	As appropriate integrate ERM work with other FSA business units. Identify opportunities to integrate at the enterprise level.		

	7/9/2004	Completed.	100% Complete

23.2   Analyze and evaluate the current use of the Electronic Records Management system within Financial Partners to identify improvements that would raise the effectiveness and efficiency of the system.

	7/9/2004	Completed.	100% Complete

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25   **FPS**   *Enhance program monitoring and oversight.*

25.1   Participate and provide Financial Partners Channel support for ED audit.

7/23/2004   The GAs are in the process of complying with E&Y's request to send in an additional three months (April through June 2004) of   85 %   Green
subrogated and receivable download data. In addition, E&Y has requested copies of GA financial statements as well as Federal
Fund balances as of June 30.   E&Y is also planning on sending demographic confirmations letters to the GAs. FP will continue
to coordinate and monitor E&Y's requests.

7/9/2004   In addition to the already completed audit work with the five GAs, Ernst & Young (E&Y) has requested an additional three   85 %   Green
months (April through June 2004) of subrogated and receivable download data from the GAs as well as FSA. FP will begin to
coordinate the E&Y request with all effected parties.

25.2   Prepare and conduct program reviews of guaranty agency and lenders/servicers. Use results to determine technical assistance, future monitoring and oversight needs.
Coordinate the interpretation of the code of Federal regulations with all elements of the Department of Education that include legal, policy, CFO, general managers and
COO in performing our reviews and assessing liabilities.

7/23/2004   During this reporting period the review team completed the second week of a two-week review at the Nebraska guaranty   70 %   Green
agency. Completed reviews of the following 3 servicers; Wyoming Student Loan Corporation, Educational Assistance Service
Comp. and Bank of North Dakota.

7/9/2004   During this reporting period a two-week program review of the Rhode Island guaranty agency was concluded, as was a CRI   60 %   Green
review of Wells Fargo. A two-week review of the Nebraska guaranty agency is in progress.

25.3   Analyze and collect third-party audit findings. Use results to determine technical assistance, future monitoring and oversight needs.   Utilize PEPS to integrate findings.

7/23/2004   Completed summary report of findings for FY03 period. The guaranty agency audit findings were non-monetary (i.e. inaccurate   100%   Green
reporting to NSLDS by GA) and Abbreviated Resolution Letters were issued to the applicable agencies. The lender audit
findings were also non-monetary and many were the result of the findings/issues identified by Sallie Mae (i.e. Error in calculation
of payment amounts).

7/9/2004   Completed draft summary report of audit findings including corrective actions taken.   98 %   Green

FSA No	Area	Milestone#	Status Date	Comments	%Complete	Status
		25.4		Utilize GA/lender scorecards to reduce risk and improve review process. Review and evaluate use of guaranty agency and lender scorecards.		
			7/23/2004	The lender review schedule for FY05 has incorporated, where feasible, the lender scorecard and identified specific lender scores. As these reviews are conducted in FY05, the results of the review findings will be analyzed with scorecard detail to determine validity of the process. The GA and Lender scorecard have been integrated into the FY05 review process. While still an experimental tool the scorecards value should increase as reviews are conducted and determination is made as to what metrics work well and what other items should be added or deleted. This project is considered finished for FY04.	100%	Green
			7/9/2004	The Regional Directors have integrated the GA scorecard into the FY05 planning and review of Guaranty Agencies. Actual scores were utilized in presenting the data. This is a major milestone in using the scorecard. While improvements will be made to the GA scorecard it is now considered usable. The lender scorecard is still being improved by the DMIT group and the contract hired to improve the functionality of the scorecard.	80 %	Green
		25.6		Conduct vulnerability assessment.		
			7/23/2004	Work on this task order began on Monday, 6.28.2004. The contractor will conduct the study within NIST standards. It should be noted that even though this action item commenced with a late start date, we are confident the contractor will complete this effort no later than Thursday, 9.30.2004.	40 %	Green
			7/9/2004	Work on this task order began on Monday, 6.28.2004. The contractor will conduct the study within NIST standards.	19 %	Green
47	EPMS			Implement enterprise contract performance monitoring measures against new systems contract awards.		
		47.2		Incorporation of FEBI into process by September 30, 2004.		
			7/22/2004	This is a continuous requirement and will carry over until the next FY.	80 %	Green
			7/9/2004	This is a continuous requirement and will carry over until the next FY.	80 %	Green
48	EPMS			Continuously update and monitor procurement internal controls.		
		48.2		Establish reporting process to monitor vendor performance.		
			7/22/2004	No change from last report.	80 %	Green
			7/9/2004	Proposals for Contractor support are due 7/09/04. This is a continuous requirement and will carry over until the next FY.	80 %	Green

54	**AWSS**	*Deliver workforce development and support programs.*				
		54.1 Continue Intern Program.				
			7/23/2004	We had our FSA Traditions Training for FSA Interns on Friday 7/16/04. Terri made an appearance which was great. At the end of the training, we solicited feedback from the interns on our program and have sent them a survey to capture some of the things they've learned about FSA over the summer. We're going to move the Intern Fair back a week to 8/2 or 8/3 so Terri can come to it.	90 %	Green
			7/9/2004	We've had several meetings with FSAU to customize the FSA Traditions training for the interns. This training will be held on Friday the 16th. I'm developing a survey for the interns to get feedback from them about FSA and their internship experience. I've also ordered and passed out display boards for the interns to use for our end of the summer "Intern Fair" which highlights their accomplishments and knowledge gained from working for us.	80 %	Green
		54.2 Conduct FSA Orientation.				
			7/20/2004	Revisions are being made to the draft of the new FSA video. The FSA NEOP web site design team developed a draft template for the FSA NEOP web site. The information to be placed on the web site is being reviewed. Notices to all FSA new employees who were unable to attend the previous FSA New Employee Orientation Program sessions have been notified to attend the September 1, 2004 session.	90 %	Green
			7/9/2004	No activity to report.	90 %	Green
		54.3 Implement results of One-ED Competitions.				
			7/23/2004	Nothing new to report.	25 %	Yellow
			7/12/2004	FSA HR learned in early July that ED has requested an extension of time to select a vendor for the HR/Training competition. This may leave FSA with less than enough time to implement any decision resulting from an award.	25 %	Yellow
		54.4 Update Skills Catalog/Learning Tracks.				
			7/23/2004	FSA U and ASEDS staff are meeting with TDC representatives July 26 to discuss developing a learning track for institutional reviewers. Additional proofreading/refining is currently ongoing and being performed in order for the catalog to accurately represent all the skills, knowledges, and functions performed by each unit. A meeting is being held on July 22 to discuss and plan the online version of the catalog.	92 %	Green

		Status Date	Comments	%Complete	Status
		7/9/2004	On July 7 the IPC approved a WSS business justification for entering into an interagency agreement with the Training and Management Assistance program of OPM. This will enable FSA U to develop learning tracks in FSA business knowledge and New Supervisor training as soon as the IA is approved.	90 %	Green

Additional proofreading/refining is currently being performed in order for the catalog to accurately represent all the skills, knowledges, and functions performed by each unit with particular attention to reorganization of ASEDS. A second meeting was held on June 25 to brainstorm ideas to prepare for the creation of an online Skills Catalog tool, followed by a meeting on June 28 to map ideas discussed at both meetings.

54.5 Implement Workforce Alignment Strategy.

		Status Date	Comments	%Complete	Status
		7/23/2004	Negotiations with the union are ongoing. OPM has submitted our request into clearance and approval is expected between 7/22 and 7/27. We have meet with OM to begin our planning for implementation.	94 %	Yellow
		7/12/2004	Initial negotiation sessions were held with the union on June 30 and July 1. While we have made progress, we don't yet have an agreement with the union. We are continuing to work with OPM on oue request for VERA/VSIP authority.	94 %	Yellow

61 CIO   *Implement Enterprise Data Strategy initiatives.*

61.7 Continue to build on Phase I by developing a detailed vision on FFEL/enrollment data flow, gaps/impact of Common Services for Borrowers (CSB), electronic Case Management and Oversight (eCMO), National Student Loan Data System (NSLDS), and electronic Campus-based systems.

		Status Date	Comments	%Complete	Status
		7/23/2004	Received approval to begin work on the Campus-Based and Case Oversight functional gap areas of deliverable 152.1.3b Data Strategy Target Vision Functional Gap Analysis (Final).	66 %	Green
		7/16/2004	Held a NSLDS Functional Gap Analysis meeting on Wednesday, July 14th to discuss NSLDS current state functions.	66 %	Green
		7/9/2004	No Change.	66 %	Green

61.9 Develop the detail Data Quality Execution Plan.

		Status Date	Comments	%Complete	Status
		7/23/2004	No Change.	66 %	Green
		7/16/2004	Held a Data Quality Steering Committee meeting on Wednesday, July14th to review the Assessment Phase of the Data Quality Implementation Methodology.	66 %	Green
		7/9/2004	No Change.	66 %	Green

61.10   Develop a holistic XML Management Plan.

7/23/2004	Cancelled Deliverables 152.2.1 Electronic Data Exchange Application Processing and Correction Record XML Schema Analysis, 152.2.2 Electronic Data Exchange Application Processing and Correction Record XML Schema Modeling, and 123.1.20 XML ISIR Technical Reference Support.	61 %	Green
7/16/2004	No Change.	61 %	Green
7/9/2004	Continued supporting the XML Registry/Repository in production.	61 %	Green

61.11   Implement the Standard Student Identification Methodology (SSIM), as defined by the FSA enterprise, as a pilot on renewal applicants.

7/9/2004	The following will happen within the next couple of months: Finalize analysis of the effectiveness of current SSIM algorithms for correction sources. Begin to modify the SSIM algorithms to implement findings, and provide possible solutions to exception conditions. Additionally, begin to analyze the change notification process, with emphasis on the volume of notifications that will be generated, and automation necessary to maintain current functionality. There will be a trading partner status meeting on Wednesday, July 14, 2004.	70 %	Green

62   **BS**   *Begin the implementation of Common Services for Borrowers (CSB).*

62.2   Begin implementing Phase 1 of the FSA-approved transition plan.

		7/26/2004	Contracts - ED continues to accrue savings from the CSB deliverable pricing. Identifying and resolving small balance accounts and closing those accounts has resulted in additional reductions in costs. The reduction comes from CSB maintaining fewer billable units (borrower accounts).	80 %	Yellow

Development - Phase 1 is comprised of 5 separate releases with a single implementation. All five releases are in various stages of testing. The schedule for the testing is being monitored closely. Phase 2 development activities are just beginning with initial Joint Applications Development (JAD) meetings being scheduled for early August.

Infrastructure - All data communications circuits and routers have been installed. This has allowed document image storage (Promissory notes, deferments, discharge requests, etc.) to be moved to a facility in Dallas Texas.

Operations - Operations continues via the legacy systems. Many operational changes have occurred independent of, but coordinated with the full CSB implementation. Examples of these changes include "Warm transfer" capabilities between all of the CSB call centers implementation of early delinquency prevention, Spanish language Loan Consolidation web site, new telecommunications infrastructure, etc.

Oversight - IV&V is reviewing all Detailed Design Documents and will produce a "Requirements Traceability Summary'. ACS IQCU and the IV&V are being asked to consider "joint" In Process Reviews (IPRs) and "joint" periodic Readiness Assessments.   Separate Production Readiness Reviews would be maintained.

IV&V - This item is also reported in milestone 13.5. The independent Verification and Validation (IV&V) team is continuing to review the functional requirements, detailed designs, and test plan. The risks that are listed in this report will be monitored in FY2005 with measures for success included.

63	**ADS**	*Improve school partner oversight.*			

		63.1 Procure a vendor to perform the high-level conceptual design of the Integrated Partner Management Solution (IPMS).			

		7/23/2004	The scope change for this milestone was approved by the IPC on 7/14/2004 in conjunction with the scope change for milestone 63.6. See milestone 63.6 for details on the current status.	88 %	Green
		7/9/2004	The title and scope of milestone 63.1 needs to be changed in conjunction with changes that need to be made to milestone 63.6. See milestone 63.6 for details.	80 %	Green

		63.6 Select competitively a vendor to perform the high-level conceptual design of the Integrated Partner Management Solution (IPMS).			

		7/23/2004	The IPC on 7/14/2004 approved the scope change for this milestone as requested.	88 %	Green

The proposal from the ILSC (Grant Thornton) was received and approved. We are waiting for the contracting officer to award.

			7/9/2004	Work continues towards selecting competitively a vendor to perform the conceptual design of the Integrated Partner Management Solution (IPMS). Feedback on the proposal from the ILSC (Grant Thornton) was provided, a follow up response was received, and the follow up response and revisions are currently being reviewed. Award is expected to occur within the next few weeks.		80 %	Green
				The second part of this milestone--the development of the IPMS--will not be completed by the target completion date of 8/30/2004. It was an oversight on our part to not have requested a scope change for this milestone at an earlier point in time because it was not a realistic expectation. At this time, however, we are requesting a scope change. Milestone 63.6 needs to be changed to "Select competitively a vendor to perform the conceptual design of the Integrated Partner Management Solution (IPMS)."			
		63.8	Procure the design of a workflow tool for SEC.				
			7/23/2004	As approved by the IPC on 7/14/2004, this milestone has been cancelled due to the fact that it is premature to procure a workflow tool for SEC. As previously noted, there is nothing additional to be done on workflow other than the IPMS high-level (conceptual) design. Sequencing Plan will determine the order of solution components.		73 %	Cancelled
			7/9/2004	At this time, we request that this milestone be cancelled. It is premature to be able to procure a workflow tool for SEC. There is nothing additional to be done on workflow other than the IPMS high level (conceptual) design. Sequencing Plan will determine the order of solution components.		73 %	Green
70	**ADS**	*Increase Student Financial Aid program awareness.*					
		70.1	Expand federal student aid awareness and outreach program.				
			7/23/2004	This Milestone has been rolled into the Front End Business Integration (FEBI) Small Business Initiative. Market research is complete.		80 %	Green
			7/9/2004	This Milestone has been rolled into the Front End Business Integration (FEBI) Small Business Initiative. Market research is complete.		80 %	Green
		70.2	Develop and implement long-term mass marketing strategy.				
			7/23/2004	ASEDS Management Council briefed. Draft Task Order complete.		50 %	Green
			7/9/2004	ASEDS Management Council briefed. Draft Task Order complete.		50 %	Green
71	**ADS**	*Reengineer EDExpress.*					

		71.3	Implement Return to Title IV Web Release.			
			7/23/2004	The list of issues has been agreed upon with the contractor. Pearson provided a schedule, based on new requirements, with FSA Acceptance Testing scheduled for August 16th through the 20th. A testing team has been put together and the PRR is tentatively scheduled for early September. The System of Records Notice (SORN) is awaiting sign off by management at the OCIO, and then it will be posted to the Federal Register for a thirty-day comment period. The anticipated completion of the clearance process is by late August.	95 %	Yellow
			7/9/2004	The list of issues has been agreed upon with the contractor. Pearson provided a schedule, based on new requirements, with FSA Acceptance Testing scheduled for August 16th through the 20th. A testing team has been put together and the PRR is tentatively scheduled for early September.The System of Records Notice (SORN) is awaiting sign off by management at FSA, and then it will be posted to the Federal Register for a thirty-day comment period. The anticipated completion of the clearance process is by late August. This product is non-year specific and delaying the posting will not impact schools adversely. There is currently a PC product that is available. An adjusted date for project completion has been requested, based on the revised schedule. We request that the completion date be changed to September 30th.	95 %	Yellow